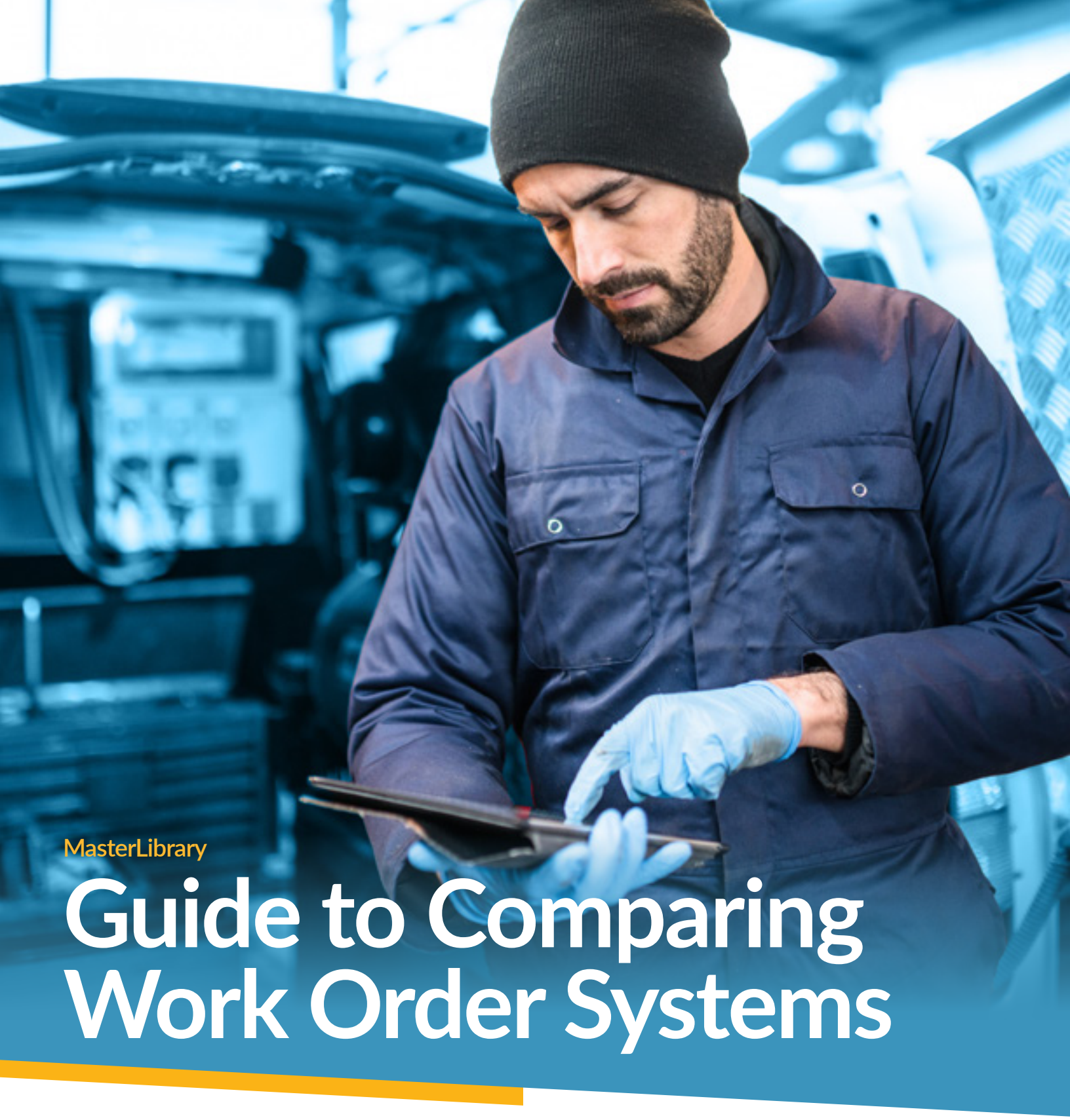

MasterLibrary

Guide to Comparing Work Order Systems

Evaluating the right Work Order system for your school district.

MasterLibrary by Follett Software

This guide is intended to help school districts evaluate and compare different systems available to manage building work orders and preventative maintenance activities within their school buildings.

With school budgets under a microscope and districts constantly fighting for additional resourcing, examining your school's work order system is a timely and responsible activity. We hope this guide helps your evaluation process.

In this guide you will learn:

- The challenges and inefficiencies that manual systems present.
- The red flags of work order software not intended for K12 schools.
- Important features to consider when evaluating solutions.

Section 1 /

The Pitfalls of manual systems

A manual system (including the use of spreadsheets) to track work orders and preventative maintenance tasks can be time consuming to manage and often lack historical data to help drive the smartest decisions on asset repairs and check ups. Manual systems reinforce inefficient communication between staff on the status of work orders and keeping track of who is doing what. It can make more work for facility staff than needed.

If you have been operating with a manual system, imagine having an online work order system where staff can log into and submit new tickets and check on the status of existing tickets without having to track someone down. Imagine having real-time updates in a system that eliminates the version control problems on your spreadsheets. Or, having notifications alert you when it's time to perform a recurring preventive maintenance check on your assets and seeing the history work done on the asset.

Here are some common issues with districts that use manual systems, that the right work order solution can solve. How many are true for your district?

Wasted Time

- Completing and handing in paper forms is inconvenient and time consuming.
- Losing or misplacing papers during the process results in work orders that don't get completed or take a long time to complete.
- Skipping certain approvers during the process, only to have extra work later when a work order is not completed properly.
- Prioritizing the order of work orders. Time is spent trying to keep things manually organized and is very susceptible to human error.

Centralization

- Searching through files or binders for specific work order forms is inefficient compared to a searchable cloud-based system.
- Tracking maintenance and IT work orders that are stored and managed in separate places.
- Having non-standardized processes district-wide with each building run its own system.
- Misplacing or losing essential paperwork required for equipment warranty and district insurance requirements.
- Providing little access to asset history for the team while they work on repairs or preventative maintenance tasks.

Miscommunication

- Requesters do not have insight into the status of their work orders.
- The space requiring the work order is not always available when needed.
- Paper forms can be chaotic to manage with multiple copies that need to get routed to different departments.
- There is confusion around assignment of the work order and when it is completed.

Operations

- Maintenance and IT staff who complete work orders don't always have a clear idea of the true nature of the problem resulting in wasted time and inefficiencies.
- Important preventative maintenance tasks are not regularly performed due to lack of a centralized schedule.
- Lack of insight without reporting to see what your staff is spending most of their time on and if there are redundancies in work effort that could be eliminated.
- No historical view of work done on assets or rooms.

Wasted Expenses

- Additional staff labor is needed to track and manage work orders.
- Lack of automated preventative maintenance schedules potentially puts assets at risk and reduces asset life.
- Lack of an automated inventory system could result in inefficient purchasing of supplies.

Section 2 /

Common red flags of a software solution not purpose-built for school districts

There are a ton of facility work order solutions on the market that can make it overwhelming to pick your top choices to evaluate. However, most are designed for diverse industries like hospitals, office buildings, and manufacturing facilities.

For schools, the need is always something that is effective, simple and budget-friendly. Facility management solutions often come packaged as a CMMS (Computerized Maintenance Management System). These solutions are complex and come with a lot of modules, bells and whistles that you simply will never use in your day to day management of school buildings. In this “all or nothing” model, you pay for wasted functionality.

Here are common problems schools have with their existing work order solutions.

Functionality

- The current interface is clunky, cumbersome and not particularly user friendly. Because of this, it is a struggle to get your facility staff to use the system.
- The current solution is outdated and rarely releases new features.
- The current system has tabs, sections, and modules that you never use, but pay for.
- The rules and workflow inside the system aren't rooted in how your school district operates.

Cost

- Constant annual subscription price increases make budgeting difficult. It's always important to check the terms and conditions to see a vendor's policy on pricing.
- Misleading base costs on a platform that do not provide the functionality you need. This leads to upgrading to different products and/or modules that are needed for maintenance and work orders.
- Forced upgrades to your platform that include modules you don't need.

Features

- Feature-bloat, resulting in far more features than your district wants or needs.
- Limitations on work order assignments to only one person vs. the ability to assign multiple users to a work order.
- Only a limited number of files can be uploaded to a work order resulting in less details about the nature of the problem and less efficient completion times.
- Slow, cumbersome report process that requires the need to build one report at a time.
- Non-flexible workflows that don't line up with your current processes, forcing you to make sacrifices in how you manage your workflows.

Support

- To alot of large software vendors, a school district is considered a small customer, compared to enterprise level organizations. This can result in a lower tier of customer support.
- Additional costs to onboard and setup software.
- Lower service level agreements resulting in longer times to resolve issues or generic answers that leave the customer still trying to troubleshoot on their own.

Section 3 /

Feature Comparison Checklist

Each district has their own pain points and most urgent needs when it comes to their facility management. Sometimes it is difficult to identify the best way to address and solve for these needs. In this section, you will see all of the potential features that will help to successfully improve your processes when it comes to managing your facilities.

Once you have identified the software vendors that prioritize K12 schools, here are some features that you should be sure a work order system contains.

Custom Forms & Workflows

One of the keys to effective work order software for school districts is the ability to customize the types of work orders the staff can submit and the different approval paths they need to take.

Custom Forms

Your work order form is the front end of your system. In schools, your work orders can vary greatly and one size fits all form does work. Find a system that allows you to build different forms for different types of work orders so you can collect the relevant information you need to completethe job.

Custom Workflows

Custom routing paths simplify your work order management process by reducing processing and completion time with customized approval paths by work order, type, and/or specific facility. Additionally, they allow you to easily create separate approval paths for Maintenance and IT work orders.

Labor & Expense Tracking

If your school district tracks your maintenance hours, your work order system can bake in a lot of the time and expense tracking you are doing today. Even if you are not, with labor and expense reports, you can start to identify trends in your team's time with work orders - which can lead to increased efficiencies.

Adding labor & expenses to work orders

Your work order software should contain fields on the back end that allow your team to add their hours completing the job, any additional expenses incurred (i.e. parts) and the ability to categorize it. And do it in a way that's easy and quick to complete.

Labor types

Create custom labor types as a way to categorize the different kinds of work your team performs. As hours and work orders are tracked against those labor types, you will be able to uncover the distribution in your labor reports.

Labor reports & dashboard

Reports specific to your labor costs and hours are extremely insightful as a birds eye view of the work your team does. Look for software that can generate reports like total number of labor hours for each user, the average days work orders are open, total labor costs and breakdowns in labor type and budget codes. Additionally, building a labor dashboard that can graphically group all of your labor reports together and allow users to drill down into them, provides tremendous value when analyzing your team's effectiveness with work orders in real time.

Inventory Management

Optimizing your inventory is an easy way to help save your district costs. A work order system that can also manage your inventory as you use parts and consumable goods to complete requests just makes sense. Look for ease of use when it comes to updating inventory in your system.

Inventory categories & types

Like an unkept storage closet, your digital inventory can start to fill cluttered inside of your system. Having software that allows users to create custom inventory categories and types makes it easy to tag inventory and parts and ultimately search for the thing your users are looking for.

Inventory management on work orders

The ability to conveniently add inventory right on the work order helps build real-time counts of your inventory while centralizing everything your team needs to manage on one page.

Inventory reports

When evaluating the inventory management capabilities of software, pay attention to the quality of reporting. It will be important to understand how quickly your inventory is being consumed, where it's being used and the cost of your orders.

Asset Management

Asset management functionality helps districts extend the life of their assets. Asset tracking allows you to manage all of your district's assets quickly and easily. Some include a QR code generator, to physically tag assets and retrieve information in an easy-to-use interface.

Robust asset data

Not all asset management modules are created equally. A work order system that claims to have robust asset management capabilities should allow users to track more than just make and model. It should allow for financial data to be tracked to it, pictures and files attached to it and even come with the capability to be placed on a digital map to represent its location on floor plans.

Asset histories

Another important piece of functionality is the ability to view the history performed on an asset. This provides your team with a better understanding of the asset they are working on, reducing time to complete work orders.

Asset check outs

School districts work with all types of assets, including tech assets and key assets. Asset check outs allows districts to view and manage available assets for check out, connect the assets to users and can provide reporting to keep track of them.

Preventative Maintenance

Having preventative maintenance capabilities with your work order software is valuable in ensuring the lifetime value of your assets. This functionality is pretty standard, but some are tedious to manage. Look for preventative maintenance capabilities that are easy to set up and use.

Setting schedules

Preventative maintenance on assets is a recurring task. Look for solutions that make it easy to set up the recurring cadence you desire.

Mass assignment

Setting up PM tasks can tedious. Solutions that allow you to mass assign a PM to multiple assets at once helps reduce setup time and ensure you have all of your assets covered.

Procedures

A procedure on PM is the step by step instructions on how to perform the PM. This ensures your PM tasks are getting handled with consistency across your whole team.

Connecting Work Orders to Events

This capability is unique to school districts but very valuable if you run a lot of internal and external events in your buildings and grounds. Having work orders for your maintenance and ground crews to set up and take down for events makes it seamless to manage.

> **The most helpful thing about ML Work Orders is that we are able to centralize all work orders and automatically assign them to the appropriate department/ individual. I also love that we are able to monitor the work orders and make any necessary changes and/or assignments if needed.**
>
> **Yolanda Lee**
> Administrative Assistant / East Cleveland City Schools

MasterLibrary by Follett Software

Schedule a one-on-one personalized demo.

Take an hour to talk with one of our expert team members for a no-pressure walk-through of the many features ML Work Orders has to offer. This dedicated time allows you to go in-depth on any questions or features you'd like to understand better.

www.masterlibrary.com/demo