**Redlist’s Work Boards Page Training**

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Hey, good morning, everybody. Today, we're gonna be doing a training on our work boards within Redlist. Uh, it's kind of going off of our theme here from the past few months I'm working on setting up our preventative maintenance programs and our lubrication routes. Once all that has been set up, then the place that those work orders and routes are managed is within our work boards tool, so we're gonna go through today how to create and manage teams within Red List and those teams are what the work boards live under. So we're gonna go through how to create those teams and then how to set up the different work boards underneath those teams.

And then walk through some of the functionality that there is within our workforce, the ability to have those work boards displayed in different units of measure dates, miles hours, and then how to also set up different workflows within each of those, which each of those work boards as well. So to start today, we're gonna start by managing our teams within Redlist. So what are the teams in Redlist? What those help us do is really just organize and group the work that needs to be done at a facility or at a company and organize it under the teams that are responsible for that work.

So for example, if you're at A at a construction company may have an operations team, the maintenance team. If you're at a large mail or paper mill, you will have a lubrication team, a maintenance team, and your operations team, and so we have the ability to create different workloads for each of those teams. So to do that, what we're going to do to start off, we're going to come down here into admin, you can go to managing teams. And then from here at the top, what we have this, this drop-down here is going to show you the three different areas of our tool. So we have our operations tool, HSE tool, and maintenance tool. Well, we have the ability to do is we have the ability to create as many teams as you need underneath each of the tools within the Redlist platform.

So for right now, we'll just stay on the maintenance tool, and currently in this account and my maintenance tool, I have these five different teams that are currently set up. So I have a lubrication team. I have an hour team which may be a little more appropriate in the operations platform, but we've got our team that handles the wood yard. We've got our operations team doing some basic care routes and we have our maintenance team here. If I want to create a new team, I can just come up here to the add team option and enter my team name. So maybe I wanted to do a. Maybe my facility. I've got a day shift and a night shift. I could say this is my I will do night shift maintenance. I can go ahead and create that team there once I've got my team created. I can then go ahead and add workboards underneath that team and so it'll see if I bring up my maintenance team here. You can have as many different workboards as you need underneath a single team. These work boards again, are just a further spot for you to organize the work that's being done by that team. So on this one, you may have umm looking at some of these examples you may have a preventative maintenance board where your team is doing the scheduled maintenance that's going on and then you may also have a repairs board.

So any of the issues that are being reported by your users are out in the field. Any repair request that they're submitting would come in and live on this separate board here so that you can view and manage your work in the different types of work you're doing independently there. But two to create and to set up a board, I'm going to jump back to our night shift maintenance one here. So currently I don't have any workboards for this team. So what I'm gonna do will come over here to a new board, start out by giving it a name. Let's say this These are my night shift rounds. I have some operational data that I need to capture grabbing some temperatures, grabbing some readings off of flow meters, or whatever it might be so I can go ahead and enter the name of my board there and this shows what this does this allows me to select a unit of measure that I want my work orders or my routes to show in on this board.

So for something like an operational round, I'm gonna want that to show in days every day we want to complete this route every week. We want to complete this route for more mobile equipment. We have a lot of our customers that will lean on the miles and kilometers option here. So if I'm running. Umm. Over-the-road trucks and I wanna do my service every 10,000 miles every 50,000 miles. I can select this option and what this will do is on the board it will show me how many miles I have on a truck until their next service is due and then we have again this hour used by kind of both mobile and stationary equipment. Uh fixed equipment, but typically we see this with like for example, cranes where they've got, you know, 200-hour services or 1000-hour services.

We can show those work orders that unit of measure for that board to be an hour, so we can know how many more operational hours we have until those 200-hour 1000-hour services are due. For this one, I'm just going ahead and selecting days for now. We also have this show duration. This is the estimated duration for how long the route or work order is going to take, so I can even show those minutes if I wanna show 120 minutes. I can do that or if I wanted to select hours that would tell me it's gonna take 2 hours estimated to complete that particular route or work order.

Then down here I have the ability to add as many columns as I want on this board and what these columns are. Just think of these as their statuses. As you can see here. So this is as I'm moving my tasks, not my work orders but the tasks underneath a work order as I'm moving them through a workflow I can set as many of these different statuses as I would like, so you can see down here we do have two requirements we have you must have at least one to do and one complete status. However, you can have as many as many different statuses in between that as you would need. So for example, in this one, we're doing my night rounds. My operation night rounds. For this one, I'll likely just have a to-do column here and then I would have a complete column.

So there are 2 fields here because what I can do is I can and I'll show an example of that here. So I can add my to-do and complete the column. But let's say I have. I want to add it to the progress column. I can go ahead, add my in-progress column, and use my in-progress status. But let's say I wanted a second one where I've got some work that needs to be done, but I'm waiting on parts. I can add a waiting on parts status and then this can live in my in progress. Uh, my in-progress status as well. And then I can change the order.

This may be because I want my waiting on parts to show first or I want my in progress to show first so that can change the order there and again I can add as many of these columns to each of these statuses as I would like when I'm done with that and I've got it all set U just come in here and hit save and at this point you'll see we've got our night rounds there that underneath our night shift maintenance team within the maintenance tool and I can go ahead and continue adding as many of those as I need and at any time I can come in and edit this change this if I wanna update my columns maybe I no longer need my waiting on parts or my in progress my operator rounds pretty much they're done or they're not. I can go ahead and head in here and I can remove those out.

Hit save and then those changes will automatically reflect within the maintenance section my underneath my boards. There is one other thing. We'll. I'll show here kind of from A and an admin or a maintenance level here. Umm, if I come in here and I want to edit a board, let's say I want to and not edit a board, but remove a board. Let's say I don't need this belt ordering one anymore. I'm just gonna wrap that into my regular maintenance board to do that and come over here. Select edit and then I can go ahead and hit archive board. When I archive this board, it's going to bring up this window.

Here it's gonna ask me a couple of questions. It's gonna ask me where I want to reassign the work orders and the routes that are currently living on that board or that are set to generate to that board. So where do I want to move those two? So for this one, I want to move it to my maintenance board so I can go ahead and select that and then it's going to ask me if I want to move the completed work orders and tasks as well. So everything that was completed on my belt ordering board, if I want to move it to have it show as completed on the maintenance board, I can do that here go ahead and toggle that on hit archive, and reassign and that's gonna go through and update that for me move the current work orders that are on the belt ordering board to the maintenance board and it's going to also any future work orders that were scheduled to land on the belt ordering board are now going to land on that maintenance board as well.

As you can see we no longer have, that belt ordering board there. The last thing I can do? Umm, let's say, for example, I've got my HR team here. I'm like there are no boards there, so just jump back to maintenance. But here, let's say I wanna move this to my HSE team. I can do that if I put a board under the wrong team. I can go ahead and update that by selecting on move board here and I can select the team that I want to move that to and from here it shows me all of my teams regardless of the part of the platform that that team is under. So if I wanna move this FEMA to my safety team, I can go ahead and do that hit move and it's going to take this FEMA board and it's going to move that over to my safety team. So if I come over here to house, click on safety, you can now see we've got that FEMA port right there, and at any time, if there are archived boards, you can go in and view those archived boards.

You can see who archived those and see some history on that as well. So it's kind of the high level setup of these tools. So again, you've got and it's dropped down. You've got the three different parts of our platform, operations, etc. And maintenance you can create as many different teams underneath those tools as you would like and under each team you can create as many boards as you would like as well.

And again, those boards are away. Just organize it. Different types of work that your team is doing. We also have some customers that use this for different locations. Let's say I've got, you know, one company, but I've got a few different locations in a small area that are kind of managed and run by the same office. I can have a board for each of my locations. You've got a couple different yards that I'm running maintenance out of or a few different areas of a mill. And I have people dedicated people responsible for each area of the mill.

I could create a wood yard or whatever it might be bored and I can have the and then I can grant access to these boards based on based on user permissions as well. So I kind of wraps up the high-level overview of setting up teams and boards. Then from there, if we jump into our work boards, I'm going to come here into maintenance. We're just gonna jump into our maintenance team right now, and from a navigation perspective, I can view the work that's gonna be done where I can jump between teams and between boards here. So I've got my I'm in my maintenance tool. I can see a list of all of my teams here, so if I want to jump into my lubrication team to see what they're doing, I can click on that and that will pull up a list of their work orders on their Lube route board.

If I want to see a list of the different I'm work boards that a team has. So if I jump back to my maintenance team, I can come in and I can see I've got my maintenance board. I've got a umm. Repairs board tank tracking and I can navigate between different teams and different boards using these two. These two drop-downs are here. Umm. As we talked about the with the different uh units of measure, those would be visible here. So this one is currently set up to show in days and so I've got my how many days this is past due or Intel it's due and then I can see the original due date if I were to set this this one would have been set up on miles or an hour.

This would show in miles an hour here, so you would see 150 hours until due, and what if it's 1500 hours when it's due? I would see that here rather than rather than my rather than my dates. I'm from here as well. When I open up one of these, one of these work orders. What I'll be able to see is I'll be able to see each of the columns. Each of those statuses that I have set up for my workflow on this work board. So from here, you can see I've got quite a few statuses and at any time, as my team is working on these, I can move these around here so that my teams in the field can also update statuses from the mobile app.

So if they're working on a task and they run into an issue where they can't complete it until they have their correct parts, they can open up their work order and change the status of that task to this waiting on parts and it will automatically update here and drop to the waiting on parts in into the waiting on parts column here. From here just some kind of basic management training here in in the work boards tool. If I wanna change due dates, let's say I wanna update this. Obviously, it's past due, so I wanna update it to, you know, within the next week or so. I can just go ahead and click on the hyperlink here the name of the work order. It'll bring up the work order details and I can go ahead and change my due date. Say that was due back in March, so I want to get that done this month. So I can change that to let's say I want it done by next Saturday so I can go ahead and update that due date if I want to assign this to a specific role.

Now role-based assignment. What this will do? Let's say I want this one to be done by E my lubrication text. What this will do is this will assign this work order to any employee who has the lubrication tech role assigned to them. So you may have three or four people on your team that are lubricating text. If you don't necessarily care which one of them gets it done, you just want to throw it to one of them. You can go ahead and put it under the lubrication tag role and that will make this work order or this route visible to everyone who has that lubrication tech role there.

I'm asking for some other options here. We have a region based. This is going to be more for our customers who are working in multiple regions, but you can assign which region this work is taking place in. If there's a specific location, got some GPS locations here, you can also call out your name and specific locations of where this work is going to take place, and then you can set the priority of this work order as well right here. Then from there, once you have your work updated and the right information on it, you can assign that workout. If you do want to make specific assignments to your users, rather than assigning just to a general role, you can do that from here by clicking on the plus button here and then searching through this list or doing a quick scroll through the list and selecting who you want to do.

You want to make these? Do you want to assign this work order this route too? And when I make those assignments, which you'll see is over here on the right-hand side, you have the initials of the people that have been assigned to this. You can hover over those and see their full name, so at a very quick glance, you'll be able to identify which of these routes work. Orders have been assigned, and which ones have not been yet? And from here a couple of different views. So this is the kind of standard view that that we use. This is our chart view which gives us that kind of Kanban or the column view here is really what this is.

But we do have a couple of other views. We do have this list view that you can go into, which is going to be a little bit more kind of traditional, almost a spreadsheet feels here where you can see a list of due dates, statuses, what, and each of these rows. Here is a task and you can arrange these columns here in whatever order you would want. So, so by clicking on column options, that'll pull up a list of all the columns that we currently have visible back here, and I can update and change this to meet my needs. So if I wanted to add an additional column, I can go ahead and open that up, I can see what my options are to say I want my task description to be umm, we wanted two columns I'm seeing and if I wanna move that up to the top, I can go ahead and do that.

Say I don't necessarily care about the component type or any of this information. I can go ahead and remove this and save those changes and you'll see back here that my table updates and so now I've got my task description and here I can update the width of my column and this will be this will be sticky here so I can see this. The changes I make here will hold over, so the next time I come to this table I'll be able to. I won't need to update every single time, but now I can see my task ascriptions status and the information that I care about here and so I can again that cannot be edited here using our column options table.

Here the last view that we have is what we call our all-task view. What this view is this view is used in in just a few different circumstances. What it does is it basically takes all of the tasks that are assigned to this board that are currently not assigned to a route or to a work order. So we do have some of our customers that rather than creating routes or work orders that are grouped together and done at a specific time, what they do is they just create a list of tasks when they're due and what area they're doing. And then what we can do from this point is use the different filters. Here I can filter down to. Maybe there's a specific area of my facility if I'm doing lubrication routes, maybe I want to grab everything that's in the body of the room so I can filter by location or I can filter by specific asset and I can see and I can filter by the due date.

So what I can do is I can kind of on a daily basis create the routes for the items that are less of. If it's something that's it's a monthly task or a yearly task, rather than creating individual routes for and for each of those frequencies, what I can do is just put my tasks in the system and then I can go ahead and I can look at what's due today and then I can select the tasks that I want, let's say all of these were in that boiler area and these were all do today I can go ahead and select all these I can right click on it and then I can I can hit edit selected tasks and actually I should have selected. It would be more tasks rather and what this will do is this will allow me to create a new work order or route for these tasks specifically so I can do two things.

I can either add them to an existing route, so let's say I've got a weekly route that's hanging out there that I want to add them to. I can do that or I can come here and I can create a new work order or a new route for these tasks. So it's a little bit of a unique circumstance, not many of our customers use it, but we do have a few customers that do and it just allows them to be a little bit more, a little bit more flexible with their, with their route creation and route completion rather than being in more of a kind of a rigid format where you have your daily, monthly, yearly, weekly routes that are being automatically generated that way. We also have filters up here, so any time you need to filter down this list to narrow it down to a specific set of work orders or routes, you can come in here. Click on that priority, and select which priorities you want to filter to.

There's a specific asset you're looking for. You can filter down to that location tags and then we have additional filters here that you can filter by as well. And this is our right now. We're currently in the current tab, so what this is showing is showing all work orders that are currently open or overdue. We then have this pending tab here. This pending tab is, is going to be a list of tasks that are not on a work order, so this can be very similar to that all-task view, but typically what our customers will use this one for is let's say I have a pre-op inspection that I'm doing on a mobile crane or on a semi-truck. When my operators are going through and filling out that inspection if they find an issue, they hit fail. No, what that will do is that will generate a task that is going to land on this in this pending queue here, and what this pending queue then what can then happen here is I can then review those items, see the information if it's something that is urgent or something.

I do want to get repaired. I can then very similar to how we did on the all tasks view, I can create a work order from those tasks, but if it's not, if it's something that's not an issue or something we don't need to take care of, I can go ahead and just ignore those tasks. So it's this pending queue that really becomes an approval step for repair requests or for failures that are being found and identified by your users out in the field. And then lastly, we have our completed column or completed queue here and this is just going to show you a list of the work orders and routes that have been completed. And then when they were completed and how long it took to complete those work orders, if you want some additional information on it, you can open this up and see a little bit more information on what date they were completed.

Maybe we got a monthly work order here. Guys were working on a bunch of tasks throughout the month. You can track when those were completed and called. Parts were used and any of that other information right here as well. What kind of high level on this on this view here We do have one other view here. We do have our work boards beta. This is a new view that our team is working on and we are building out and looking to potentially transition to down the road, but this has all the same functionality of our current work boards that we just went over just in a little bit different format and a little bit different layout. So right here at the top I've got my I can see my team and me and my boards here so I can open this up and if I wanna look at a different team I wanna pull in my HR team or whatever it might be.

I can come here and select that that'll update my boards over here so rather than having those two drop-downs in the top left like we saw in the other one, I can go ahead and just select that here. And I also have the ability to create a new board directly from here in this view, rather than needing to go and do it within my admin settings there. Then from here, I can search for work orders. I can let me jump back to. Any team that has work orders on it, but from here I can then search and filter my work orders in many of the same ways that I was able to in the old view with those filters across the top so I can view that here and then down here on the left-hand side what I have is a list of my work orders and when I click on these and open them up.

Umm, let me find one that's got a few more tasks on it so that we can just go with this one here. So we've got five tasks on this. One what? I'll now see here is I will see a list of the tasks that need to be completed. On this route, I'm and again I have, you know, much the same functionality as I had before. I've got it. I can see a list of my parts so I can see a list of the tasks that need to be done. On this one, I don't have any parts that are for. For this particular work order, I can see a list of those tasks if I wanna see any task details, I can click here and see my task details. Here I can dive into the parts that are needed for this task. If there are any forms that need to be filled out, I can see that. Umm, I can make comments back and forth as a team. And I can tag people in that. So when I make a comment, let's say I am waiting on parts, I can come in here and I can make a comment and say add down and Davenport. E that Dallen we need to order parts for this. And what this will do is this will tag down in this message. It will send him a notification so that he knows that you know what I need.

I need parts before I can complete this task and then I can go ahead and update my task status to waiting on parts so we can kind of communicate back and forth that way directly within the task, which eliminates the need for sending text messages or emails or any of that information back and forth there. And then from here when I am done or this work order is done. If my team isn't completing them out in the field, what I can then do is if I want to close this work order out, I can just come here to the top corner and I can hit complete there. If there are any forms that are necessary, it will flag that it'll let me know. I've got a form I need to fill out and then I can just go ahead and hit complete tasks. Here the last thing I'll show on this one is if I do want to make an assignment for this, I can just come over here to this little person icon with the plus button.

I can click on that and that brings up my same assignment window here and I can go ahead and make the necessary assignments there. So that's kind of that's our high-level training this month on work boards that are definitely not all of the functionality as you saw as we kind of click through and scrolled through some things, there's quite a bit of information and quite a bit of detail that we can go into in, within our tasks looking at little bit further detail into communications, into timers, into parts and how to add parts and costs to these tasks and that's something that we will go over in, in our training next month. We'll go into a deeper dive into our work boards and into a kind of the next level of usage within our work boards.

We wanna thank you guys for your time today. Thank you for showing up and we hope that these trainings are helpful for you and we look forward to seeing you next month. Thank you.