

M I S

Conrad Grundke

12/21/04

History

- Department Originally Called:
ACCOUNTING
- Limited Programming and High Cost of Storage was a way of life.
- Handled:
 - Accounts Payable
 - Accounts Receivable

Evolution

- Technology in both Hardware and Software influenced mission of department and it became known as:
 - Management Information System
 - Information System
 - Information Technology

New Mission

Provide Management with tools for running the business in addition to payroll and accounting.

Based on this Mission

I requested the following information
on 11/5/04 from Jerry Storage.

Exception Report

Conrad Grundke
11/5/2004

Situation

Time to complete job requires excessive duration from start to finish.

Potential Resident Complaint.

Possible Causes

- Excessive workload – lag time.
- Not repaired correctly in prior service call.
- Scheduling is not efficient (multiple skills required).
- Manor is a “lemon” due to:
 - Resident
 - Manor situation
 - Manor type, or,
- No Problem at all

Objective

- Use MIS database to flag manors with potential problems and provide detail report on an as requested basis.

Methodology

- Create a program to review historical work orders for each manor.
- List manors/buildings which have had 3 or more work orders in the past 90 days (Exception Report).
- Provide detail list of work orders on manors/buildings from the Exception Report as requested by Management or Committee.

Sample Exception Report

Type	ID	Unit	Start Date	End Date	Hours	Labor \$	Mtrl \$	Ttl \$	Span Days
Castilla	863		09/18/04	11/05/04	96.7	\$3,037.54	\$245.61	\$3,283.15	48
Seville	309	A	10/09/04	11/05/04	54.1	\$1,698.68	\$216.43	\$1,915.11	27

Summarized by Building or Manor.

**Allows for identifying exception by any one of the parameters;
hours, labor \$, Material \$, Total \$, Span Days**

Detail Report

- List all detail for the manor/building number:
 - Date
 - Building Type
 - Building #
 - Manor #
 - Work Code
 - Labor hours
 - Material costs

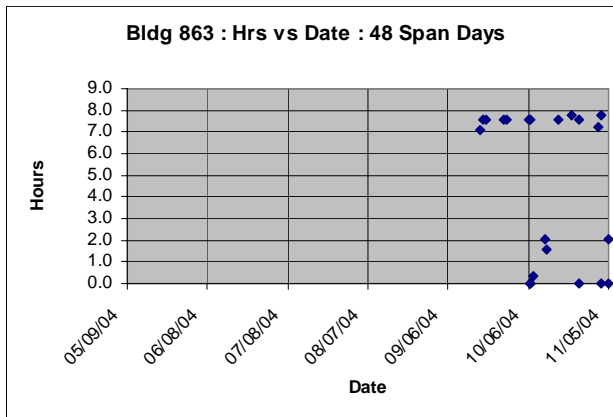
Sample Detail Listing

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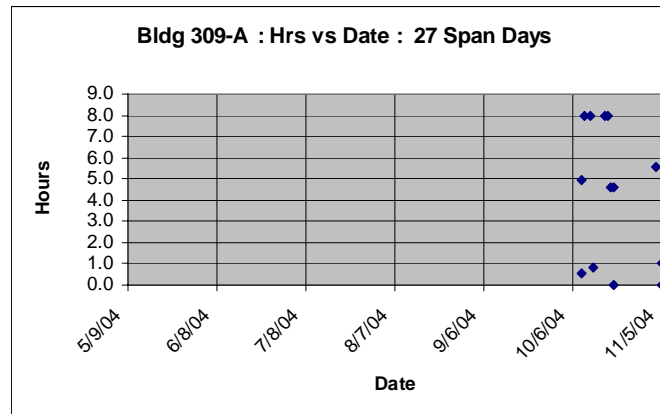
Type	ID	Unit	Date	Wk Code	Hours	Labor \$	Mtrl \$	Ttl \$
Castilla	863		11/05/04	2606	2.1	\$65.08		\$65.08
Castilla	863		11/05/04	2606	0.0		\$10.02	\$10.02
Castilla	863		11/02/04	2606	7.8	\$245.11		\$245.11
Castilla	863		11/02/04	2606	0.0		\$16.20	\$16.20
Castilla	863		11/01/04	2606	7.2	\$226.26		\$226.26
Castilla	863		10/25/04	2606	7.6	\$238.64	\$25.33	\$263.97
Castilla	863		10/25/04	2606	0.0		\$41.48	\$41.48
Castilla	863		10/22/04	2606	7.8	\$245.11		\$245.11
Castilla	863		10/17/04	2606	7.6	\$238.64	\$25.33	\$263.97
Castilla	863		10/13/04	2606	1.6	\$49.02		\$49.02
Castilla	863		10/12/04	2606	2.1	\$65.08		\$65.08
Castilla	863		10/05/04	2606	0.3	\$10.02		\$10.02
Castilla	863		10/07/04	2606	7.6	\$238.64		\$238.64
Castilla	863		10/07/04	2606	0.0		\$92.26	\$92.26
Castilla	863		10/07/04	2606	0.0		\$25.85	\$25.85
Castilla	863		10/07/04	2606	0.0		\$9.14	\$9.14
Castilla	863		10/06/04	2606	7.6	\$238.64		\$238.64
Castilla	863		09/28/04	2606	7.6	\$238.64		\$238.64
Castilla	863		09/27/04	2606	7.6	\$238.64		\$238.64
Castilla	863		09/25/04	2606	7.6	\$238.64		\$238.64
Castilla	863		09/18/04	2606	7.6	\$238.64		\$238.64
Castilla	863		09/18/04	2606	7.1	\$222.74		\$222.74
					96.7	\$3,037.54	\$245.61	\$3,283.15
Seville	309	A	11/05/04	2632	1.0	\$31.62		\$31.62
Seville	309	A	11/05/04	2632	0.0		\$15.91	\$15.91
Seville	309	A	11/03/04	2632	5.6	\$175.01		\$175.01
Seville	309	A	10/29/04	2606	4.6	\$143.60		\$143.60
Seville	309	A	10/20/04	2606	0.0		\$100.52	\$100.52
Seville	309	A	10/19/04	2606	4.6	\$143.60		\$143.60
Seville	309	A	10/16/04	2606	8.0	\$251.30		\$251.30
Seville	309	A	10/17/04	2606	8.0	\$251.30		\$251.30
Seville	309	A	10/13/04	2606	0.8	\$25.65	\$100.00	\$125.65
Seville	309	A	10/12/04	2606	8.0	\$251.30		\$251.30
Seville	309	A	10/10/04	2606	8.0	\$251.30		\$251.30
Seville	309	A	10/09/04	2606	5.0	\$155.85		\$155.85
Seville	309	A	10/09/04	2606	0.6	\$17.95		\$17.95
					54.7	\$1,696.68	\$216.43	\$1,915.11

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Sample Exception Graph



Sample Exception Graph



Reference Report

- Reference:
 - “Detail Information for Dry Rot Expenditures”
by Cynthia Grace dated 10/21/04

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P Type	P ID	P Unit	Year	Wk Cd	Job Num	Job Num/Job Desc	Total Cost
B	518		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 148.59
B	519		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 66.04
B	520		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 132.08
B	521		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 49.53
B	521		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 66.04
B	522		2003	2606	A32010	A32010: BUILDING REHAB/DRY ROT	\$ 11.31
B	522		2003	2606	A32010	A32010: BUILDING REHAB/DRY ROT	\$ 11.31
B	522		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 66.04
B	523		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 82.55
B	524		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 49.53
B	525		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 24.54
B	525		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 99.06
B	526		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 82.55
B	527		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 214.62
B	528		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 214.62
B	528		2001	2632	A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 59.43
B	528		2003		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 65.08
B	528		2003		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 32.22
B	528		2003		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 10.02
B	528		2003		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 39.33
B	529		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 231.14
B	530		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 24.54
B	530		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 43.00
B	530		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 231.14
B	530		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 231.14
B	530		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 231.14
B	530		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 6.14
B	531		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 231.14
B	532		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 13.05
B	532		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 231.14
B	533		2001	2606	A32010	A32010: BUILDING REHAB/DRY ROT	\$ 9.90
B	534		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 231.14
B	536		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 66.04
B	537		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 65.99
R	537		2001		A32014	A32014: DRY ROT - PRIOR TO PAINT	\$ 231.14

Missing Work Codes

Summary

- The missing data would suggest that this data is NOT entered in the database:
 - **If not**; how do we get immediate implementation?
 - **If it is**; why does it not show up?
- We must identify what needs to be done to make the MIS database useable as a management tool.

Test Run

- To verify the workings of the system before doing any programming work, please provide us a listing of work orders for the following manors for 2003-4:

225	226-B
228	184
2212	643

Prefer digital to paper output.

Conclusion

- Staff and the United Board have one objective!
- By working together we can increase our efficiency and quality of effort to make the residents confident that we are considering their needs.

The End

Based on this type of
Management Information Data:

I would expect to obtain the
following analysis.

Exception Report Examples

Conrad Grundke

Objective

- Identify a potential service problem
- Evaluate effectiveness of service
- Measure lag time
- Create an on-line management tool
 - Establish criteria of 3 calls in last 30 days
 - Flag Manor or Building
 - Provide access to detail information

Summary Reports

United M&C **1/31/4** Exception Report *Summary*

Manor	Calls	Span	Hours	Mo/Yr

United M&C **2/28/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr

United M&C **3/31/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr
225-A	12	18	7.9	1

[Graph](#)

United M&C **4/30/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr
225-A	16	36	10.2	2

[Graph](#)

United M&C **5/31/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr
225-A	19	80	11.6	3

[Graph](#)

United M&C **6/30/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr

[Graph](#)

United M&C **7/31/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr
225-A	24	134	15.3	4

[Graph](#)

United M&C **8/31/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr

[Graph](#)

United M&C **9/31/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr

[Graph](#)

United M&C **10/30/4** Exception Report
Summary

Manor	Calls	Span	Hours	Mo/Yr

[Graph](#)

The End

Detail Reports

United M&C **3/31/4** Exception Report *Detail*

Bldg	Manor	Calls	Span	Hours
225	A	12	18	7.9

03/19/04	912	D	A94210: CARPENTRY SERV-PREPAI	2511	Repair Wardrobe Door	0.7	\$ 27.33
03/19/04	914	D	A37008: PLUMBING LEAKS	7502	Mixit Valve Leak	0.6	\$ 23.77
03/11/04	912	D	A32001: CARPENTRY SERVICE DMO	2204	Repr/repl Sliding Glass D	0.5	\$ 19.52
03/11/04	913	D	A30006: ELECTRICAL SERVICE DMO	3220	Switch Out	0.4	\$ 14.52
03/11/04	914	D	A37002: MISC CHGS-DMO INCLUDES	7710	Install Shower Hose	0.3	\$ 11.88
03/11/04	914	D	A37002: MISC CHGS-DMO INCLUDES	7723	Hand Held Shwr Head Nc	0.3	\$ 11.88
03/11/04	912	D	A32001: CARPENTRY SERVICE DMO	2503	Repair Kitchen Cabinet	0.3	\$ 11.71
03/11/04	912	D	A32001: CARPENTRY SERVICE DMO	2414	Ba/r Acc Repair	0.3	\$ 11.71
03/03/04	914	R	A94109: PLUMBING REPLACEMENTS	7113	Replace Water Heater	2.0	\$ 79.24
03/03/04	914	D	A37002: MISC CHGS-DMO INCLUDES	7103	No Hot Water	0.4	\$ 15.84
03/01/04	913	D	A30002: DISHWASHER REPAIRS	1303	Dishwasher Out	1.1	\$ 39.94
03/01/04	914	R	A94109: PLUMBING REPLACEMENTS	7204	Replace Garbage Dispos	1.0	\$ 39.62

[Return](#)

[Graph](#)

United M&C **4/30/4** Exception Report *Detail*

Bldg	Manor	Calls	Span	Hours
225	A	16	36	10.2

04/06/04 914	D	A37008: PLUMBING LEAKS	7503	Toilet Repair	0.4	\$ 15.84
04/05/04 914	D	A37010: PLUMBING REPAIRS/PREPA	7509	Stopper Out	1.0	\$ 39.62
04/05/04 914	D	A37008: PLUMBING LEAKS	7503	Toilet Repair	0.5	\$ 19.81
04/05/04 914	D	A37002: MISC CHGS-DMO INCLUDES	7614	Acid Wash Tilt	0.4	\$ 15.84
03/19/04 912	D	A94210: CARPENTRY SERV-PREPAII	2511	Repair Wardrobe Door	0.7	\$ 27.33
03/19/04 914	D	A37008: PLUMBING LEAKS	7502	Mixit Valve Leak	0.6	\$ 23.77
03/11/04 912	D	A32001: CARPENTRY SERVICE DMO	2204	Repr/repl Sliding Glass D	0.5	\$ 19.52
03/11/04 913	D	A30006: ELECTRICAL SERVICE DMO	3220	Switch Out	0.4	\$ 14.52
03/11/04 914	D	A37002: MISC CHGS-DMO INCLUDES	7710	Install Shower Hose	0.3	\$ 11.88
03/11/04 914	D	A37002: MISC CHGS-DMO INCLUDES	7723	Hand Held Shwr Head No	0.3	\$ 11.88
03/11/04 912	D	A32001: CARPENTRY SERVICE DMO	2503	Repair Kitchen Cabinet	0.3	\$ 11.71
03/11/04 912	D	A32001: CARPENTRY SERVICE DMO	2414	Ba/r Acc Repair	0.3	\$ 11.71
03/03/04 914	R	A94109: PLUMBING REPLACEMENTS	7113	Replace Water Heater	2.0	\$ 79.24
03/03/04 914	D	A37002: MISC CHGS-DMO INCLUDES	7103	No Hot Water	0.4	\$ 15.84
03/01/04 913	D	A30002: DISHWASHER REPAIRS	1303	Dishwasher Out	1.1	\$ 39.94
03/01/04 914	R	A94109: PLUMBING REPLACEMENTS	7204	Replace Garbage Dispos	1.0	\$ 39.62

[Return](#) [Graph](#)

United M&C **5/31/4** Exception Report *Detail*

Bldg	Manor	Calls	Span	Hours
225	A	19	80	11.6

05/20/04 913	D	A30006: ELECTRICAL SERVICE DMO	3213	Repair Bath Heater	0.4	\$ 14.52
05/11/04 913	D	A30006: ELECTRICAL SERVICE DMO	3213	Repair Bath Heater	0.4	\$ 14.52
05/03/04 914	D	A37008: PLUMBING LEAKS	7503	Toilet Repair	0.6	\$ 23.77
04/06/04 914	D	A37008: PLUMBING LEAKS	7503	Toilet Repair	0.4	\$ 15.84
04/05/04 914	D	A37010: PLUMBING REPAIRS/PREPA	7509	Stopper Out	1.0	\$ 39.62
04/05/04 914	D	A37008: PLUMBING LEAKS	7503	Toilet Repair	0.5	\$ 19.81
04/05/04 914	D	A37002: MISC CHGS-DMO INCLUDES	7614	Acid Wash Tilt	0.4	\$ 15.84
03/19/04 912	D	A94210: CARPENTRY SERV-PREPAII	2511	Repair Wardrobe Door	0.7	\$ 27.33
03/19/04 914	D	A37008: PLUMBING LEAKS	7502	Mixit Valve Leak	0.6	\$ 23.77
03/11/04 912	D	A32001: CARPENTRY SERVICE DMO	2204	Repr/repl Sliding Glass D	0.5	\$ 19.52
03/11/04 913	D	A30006: ELECTRICAL SERVICE DMO	3220	Switch Out	0.4	\$ 14.52
03/11/04 914	D	A37002: MISC CHGS-DMO INCLUDES	7710	Install Shower Hose	0.3	\$ 11.88
03/11/04 914	D	A37002: MISC CHGS-DMO INCLUDES	7723	Hand Held Shwr Head No	0.3	\$ 11.88
03/11/04 912	D	A32001: CARPENTRY SERVICE DMO	2503	Repair Kitchen Cabinet	0.3	\$ 11.71
03/11/04 912	D	A32001: CARPENTRY SERVICE DMO	2414	Ba/r Acc Repair	0.3	\$ 11.71
03/03/04 914	R	A94109: PLUMBING REPLACEMENTS	7113	Replace Water Heater	2.0	\$ 79.24
03/03/04 914	D	A37002: MISC CHGS-DMO INCLUDES	7103	No Hot Water	0.4	\$ 15.84
03/01/04 913	D	A30002: DISHWASHER REPAIRS	1303	Dishwasher Out	1.1	\$ 39.94
03/01/04 914	R	A94109: PLUMBING REPLACEMENTS	7204	Replace Garbage Dispos	1.0	\$ 39.62

[Return](#) [Graph](#)

United M&C **7/31/4** Exception Report *Detail*

Bldg	Manor	Calls	Span	Hours
225	A	24	134	15.3

225 A	07/13/04 912	D	A32001: CARPENTRY SERVICE DMO 2212	Door Wont Open/close Ir	0.4	\$ 15.62
225 A	07/01/04 913	D	A30003: REFRIGERATOR REPAIRS 1105	Broken/missing Item	0.8	\$ 29.04
225 A	07/01/04 912	R	A94209: CARPENTRY REPLACEMENTS 2906	Repair/replace Window S	0.4	\$ 15.62
225 A	06/24/04 913	R	A94409: APPLIANCE REPLACEMENT 1210	Replace Cooktop	1.8	\$ 65.35
225 A	06/24/04 913	D	A30001: OVEN REPAIRS 1624	Broken/missing Item	0.3	\$ 10.89
225 A	05/20/04 913	D	A30006: ELECTRICAL SERVICE DMO 3213	Repair Bath Heater	0.4	\$ 14.52
225 A	05/11/04 913	D	A30006: ELECTRICAL SERVICE DMO 3213	Repair Bath Heater	0.4	\$ 14.52
225 A	05/03/04 914	D	A37008: PLUMBING LEAKS 7503	Toilet Repair	0.6	\$ 23.77
225 A	04/06/04 914	D	A37008: PLUMBING LEAKS 7503	Toilet Repair	0.4	\$ 15.84
225 A	04/05/04 914	D	A37010: PLUMBING REPAIRS/PREPAID 7509	Stopper Out	1.0	\$ 39.62
225 A	04/05/04 914	D	A37008: PLUMBING LEAKS 7503	Toilet Repair	0.5	\$ 19.81
225 A	04/05/04 914	D	A37002: MISC CHGS-DMO INCLUDES 7614	Acid Wash Tlt	0.4	\$ 15.84
225 A	03/19/04 912	D	A94210: CARPENTRY SERV-PREPAID 2511	Repair Wardrobe Door	0.7	\$ 27.33
225 A	03/19/04 914	D	A37008: PLUMBING LEAKS 7502	Mixit Valve Leak	0.6	\$ 23.77
225 A	03/11/04 912	D	A32001: CARPENTRY SERVICE DMO 2204	Repr/ repl Sliding Glass D	0.5	\$ 19.52
225 A	03/11/04 913	D	A30006: ELECTRICAL SERVICE DMO 3220	Switch Out	0.4	\$ 14.52
225 A	03/11/04 914	D	A37002: MISC CHGS-DMO INCLUDES 7710	Install Shower Hose	0.3	\$ 11.88
225 A	03/11/04 914	D	A37002: MISC CHGS-DMO INCLUDES 7723	Hand Held Shwr Head No	0.3	\$ 11.88
225 A	03/11/04 912	D	A32001: CARPENTRY SERVICE DMO 2503	Repair Kitchen Cabinet	0.3	\$ 11.71
225 A	03/11/04 912	D	A32001: CARPENTRY SERVICE DMO 2414	Ba/r Acc Repair	0.3	\$ 11.71
225 A	03/03/04 914	R	A94109: PLUMBING REPLACEMENTS 7113	Replace Water Heater	2.0	\$ 79.24
225 A	03/03/04 914	D	A37002: MISC CHGS-DMO INCLUDES 7103	No Hot Water	0.4	\$ 15.84
225 A	03/01/04 913	D	A30002: DISHWASHER REPAIRS 1303	Dishwasher Out	1.1	\$ 39.94
225 A	03/01/04 914	R	A94109: PLUMBING REPLACEMENTS 7204	Replace Garbage Dispos	1.0	\$ 39.62

[Return Graph](#)

Graphs

