

OrgMan

Organizational Management Software

Product "Quick-Tour"

Simple - Scalable - Inexpensive - Effective: OrgMan is the Solution for Your Organization

Effective, Action-Oriented Communication

The biggest challenge in any organization is assuring effective communication & completion of the numerous activities that must be completed to successfully implement or maintain a management program.

Typically, these activities are described in static, passive documents such as policies & procedures, manuals, permits, and general schedules. Unfortunately, the passive nature of these documents means that team members must continually seek out information describing the details and timing of their roles and responsibilities in these programs.

OrgMan provides a platform for transforming the information in these static, passive documents into discrete, action-oriented tasks that are pushed to team members in a timely fashion describing **what** needs to be accomplished, **when** the task needs to be complete, **who** should complete the task, **where** the task needs to be completed (i.e., what facility, department, division, etc. the task applies to), and documentation describing **why** and **how** the task should be completed.

The screenshot shows the OrgMan Manager application window. The title bar reads 'OrgMan Manager'. The menu bar includes 'File', 'Edit', 'View', 'Tools', and 'Help'. The interface is divided into several sections:

- OrgMan Views:** A sidebar on the left with icons for Model, Compliance Units, Resources, Calendar, Items, and Task List.
- Model Status and Scheduling:** The main area, showing a tree view of compliance units. The selected unit is 'Lockout/Tagout', which is expanded to show a list of tasks. One task, 'Review energy control procedures at least annually', is highlighted in blue.
- Scheduled Requirements:** A table showing requirements for 'Facility #1' with 'Project Engineer' as the primary resource.
- Tasks:** A table listing tasks with columns for Due Date, Status, Completion Date, and Actions.

Compliance Unit	Primary Resource
Facility #1	Project Engineer

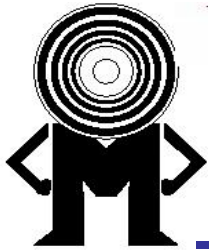
Due Date	Status	Completion Date	Actions
10/15/2000	Not started		No
10/15/2001	Not started		No
10/15/2002	Not started		No
10/15/2003	Not started		No
10/15/2004	Not started		No

Regardless of status where tasks are due on or after 03/21/2000 and tasks are due on or before

The power of **OrgMan** is its simple, concise and effective management of the fundamental, action-oriented "task". **OrgMan** beautifully assembles **What** must be done, **Who** should do it, **Where & When** it needs to be done, and **How** to complete the task - and pushes it to the user when it is needed.



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What...

OrgMan's default **Model View** displays task description information in the main window, organizing activities into logical groupings called **Management Areas**. Clicking a description in the main window displays details (assigned team member, due dates, completion status, etc) in the other windows of this view.

The screenshot displays the OrgMan Manager application. The main window is in the 'Model View', showing a tree structure of 'Management Areas' under a 'Compliance Unit'. A red arrow points from a task description in the tree to a secondary window titled 'Resource Status'. This secondary window shows a table of resources and a table of tasks. A red circle highlights a task description in the 'Resource Status' window, with another red arrow pointing from it to a text box below.

Compliance Unit	Primary Resource
Facility #1	Project Engineer

Name	Compliance Unit	Requirement Name
Auditor	Facility #2	Review and update SPCC Plan as necessary
Compliance Manager	Facility A2	Conduct NPDES monitoring
Compliance Specialist	Facility A	Conduct NPDES monitoring
Compliance, John	Facility A	Review and update SPCC Plan as necessary
Contractor	Facility B	Review and update SPCC Plan as necessary
Environmental Coordinator		
Geologist		
Manager, Sally		
Plant Engineer		
Project Engineer		
Safety Engineer		
Safety Specialist		

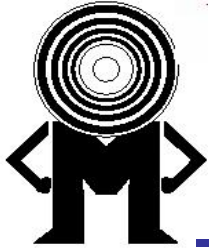
Due Date	Status	Completion Date
04/10/2000	Complete	04/15/2000
05/10/2000	Complete	05/16/2000
06/10/2000	Complete	05/18/2000
07/10/2000	Complete	05/26/2000
08/10/2000	Complete	05/30/2000
09/10/2000	Not started	
10/10/2000	Not started	
11/10/2000	Not started	
12/10/2000	Not started	
01/10/2001	Not started	

In other views, such as the **Resource Status** view shown at the right, the task description is displayed for easy access in the secondary windows.

Double-clicking or right-clicking on the task description in either window displays more information describing the task (notes fields, task classifications, etc.).



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Who...

Team Members assigned the responsibility of completing tasks are referred to as **Primary Resources** in OrgMan. The assigned Primary Resource is displayed in each of OrgMan's default views - which can be customized to fit the user's needs.

The screenshot shows the OrgMan Manager interface. On the left, the 'Resources' view is active, displaying a list of resources including 'Manager, Sally', 'Project Engineer', and 'Safety Specialist'. A red arrow points from the 'Resources' view to the 'Resource Status' view. The 'Resource Status' view shows a table of resources and their assigned tasks. The table has columns for 'Name', 'Compliance Unit', 'Requirement Name', 'Date', 'Status', and 'Completion Date'. The 'Manager, Sally' and 'Safety Specialist' resources are circled in red. A red arrow points from the 'Resource Status' view to the 'Tasks' view, which shows a list of tasks with their status and completion dates.

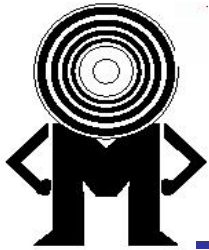
Name	Compliance Unit	Requirement Name	Date	Status	Completion Date
Auditor	Facility #2	Review and update SPCC Plan as necessary	04/10/2000	Complete	04/15/2000
Compliance Manager	Facility A	Conduct NPDES monitoring	05/10/2000	Complete	05/16/2000
Compliance Specialist	Facility A	Conduct NPDES monitoring	06/10/2000	Complete	05/18/2000
Compliance, John	Facility B	Review and update SPCC Plan as necessary	07/10/2000	Complete	05/26/2000
Contractor			08/10/2000	Complete	05/30/2000
Environmental Coordinator			09/10/2000	Not started	
Manager, Sally			10/10/2000	Not started	
Project Engineer				Not started	
Safety Specialist				Not started	

The **Resource Status View** makes it easy to view your organization's entire OrgMan knowledge base ordered by the **Primary Resource**.

OrgMan allows you to assign tasks to **specific individuals** (Sally Manager) or to **roles** (Safety Specialist).



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Where...

OrgMan refers to where a task needs to be completed as the task's associated **Compliance Unit**. This is listed in all Views - typically in to top right window area.

Compliance Unit: (All compliance units)

Compliance Model for <unit>

- Conduct job evaluation to determine if ergonomic str...
- Conduct job hazard analysis
- Conduct MSD training
- Evaluate Quick Fix to ensure controls have eliminat...
- Identify, assess and implement feasible control...
- Implement ergonomic program
- Implement Quick Fix and eliminate MSD haz...
- Review and update ergonomics program
- Verify compliance with record retention requir...

Exposure to Chemical Hazards

Fire Protection Brigades and Systems

Flammable and Combustible Liquids

Fueling Stations

Hand and Portable Powered Tools and Other Hand-Hel...

Hazard Communication

Hazardous Waste Operations and Emergency

Hearing Conservation

Lockout/T agout

Machine Guarding

Compliance Unit	Primary Resource
Facility A	Safety Specialist
Facility B	Safety Specialist
Facility C	Safety Specialist
Facility D	Safety Specialist

Scheduled Requirements for: Conduct MSD training

The **Model View** can filter tasks based on the associated **Compliance Unit**. This screen shot shows the same **Model View**, except it only displays information for tasks assigned for Facility A.

Compliance Unit Status

Scheduled Requirements for: Facility A

Due Date	Status	Completion Date	Actions Required
04/10/2000	Complete	04/15/2000	No
05/10/2000	Complete	05/15/2000	No
06/10/2000	Complete	05/18/2000	No
07/10/2000	Complete	05/25/2000	No
08/10/2000	Complete	06/20/2000	No
09/10/2000	Not started		No
10/10/2000	Not started		No
11/10/2000	Not started		No
12/10/2000	Not started		No

The **Compliance Unit Status View** makes it easy to view your organization's entire OrgMan knowledge base ordered by the **Compliance Unit(s)** a task is associated with.

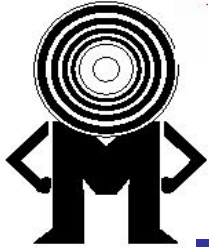
Model Status and Scheduling

Scheduled Requirements for: Conduct NPDES monitoring

Due Date	Status	Completion Date	Actions Req.
04/10/2000	Complete	04/15/2000	No
05/10/2000	Complete	05/18/2000	No
06/10/2000	Complete	05/25/2000	No
07/10/2000	Complete	05/25/2000	No
08/10/2000	Complete	05/30/2000	No
09/10/2000	Not started		No
10/10/2000	Not started		No
11/10/2000	Not started		No
12/10/2000	Not started		No
01/10/2001	Not started		No



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When...

There are two pieces of timing data important to managing your program - the **Due Date** and the **Completion Date**. All **OrgMan** views display both of these dates by default.

Like any column of information in an **OrgMan** view, the data can be organized in ascending or descending order based on either of these dates by **clicking the column heading**.

The screenshot shows the OrgMan Manager application with a task list view. The task list has columns for Due Date, Status, Completion Date, and Actions. A red arrow points from the text above to the 'Due Date' column header. Another red arrow points from the 'Due Date' column header to the '10/15/2000' entry in the list.

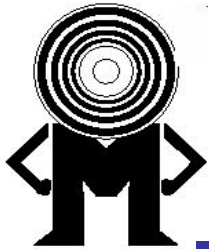
Due Date	Status	Completion Date	Actions
10/15/2000	Not started		No
10/15/2001	Not started		No
10/15/2002	Not started		No
10/15/2003	Not started		No
10/15/2004	Not started		No

Below the task list, a calendar view is shown for February 2001. A red arrow points from the text above to the calendar. The calendar shows dates from 1 to 28. A red arrow points from the text above to the date 15, which is bolded. Below the calendar, a table shows tasks due on or before 03/21/2001.

Due Date	Status	Completion Date
02/02/2001	Not started	
02/09/2001	Not started	
02/16/2001	Not started	
02/23/2001	Not started	

There is also a **Calendar View** that organizes & displays task information based on the **Due Date**.

In this **OrgMan** View, selecting a range of dates on the calendar displays information for tasks that come due during the selected time period. Bold days on the calendar indicate dates on which tasks are due.



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Why & How...

Right-clicking a requirement in any **OrgMan** view allows users to access the **Properties Window** for that requirement. The **Properties Window** displays more information to help the **Primary Resource** complete the task, including, requirement name & basic description, classifications, notes, and references to document citations requiring the task (policies, permits, manuals, etc.).

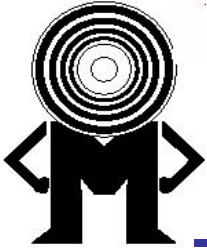
This information, along with information linked in the **Document Management System**, places the "How" and "Why" at your fingertips right when you need it.

The screenshot illustrates the workflow for accessing documents related to a requirement. It shows a tree view of compliance units, a 'Requirement Properties (Read Only)' dialog box with a 'Documents...' button circled in red, and a window titled 'Documents for Review energy control procedures at least annually to verify com...' displaying a list of documents. A red arrow points from the 'Documents...' button in the dialog to the document list window. Another red arrow points from a requirement in the tree to the dialog box. A padlock icon is shown below the document list window.

Document Name	Modified
lock.jpg	07/29/2003
Federal OSHA Lockout Page.url	07/29/2003

In addition, **OrgMan's Document Management System** allows you to access virtually any type of document that might be gathered to help the **Primary Resource** complete the task, including web pages, manuals, instruction sheets, diagrams, etc.

OrgMan's Document Management System comes with a built-in image viewer, making it even easier to view pictures or diagrams.



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Completion Information...

From any OrgMan window that displays Due Date, users can access the task completion window. Users can enter a **Completion Status**, **% complete**, **completed date**, **who completed the task**, and optional information such as an actual cost & actual time spent completing the task.

The screenshot shows the OrgMan software interface. On the left, there is a tree view of compliance units. The main window displays a list of tasks. A red arrow points from the text box to the 'Task due 10/15/2000' window, which is open over the task list. The task list table is as follows:

Due Date	Status	Completion Date	Actions
10/15/2000	Complete	07/30/2003	No
10/15/2001	Not started		No
10/15/2002	Not started		No
10/15/2003	Not started		No
10/15/2004	Not started		No

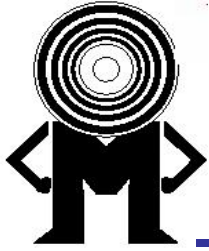
The 'Task due 10/15/2000' window shows the following information:

- Task: 10/15/2000
- Completion Status: Complete
- % Complete: 100
- Completed On: 07/30/2003
- Completed By: Project Engineer
- Actual Cost: 0
- Actual Hours: 4.0
- Verification: This completion has not been verified.
- Buttons: Documents..., Print, OK, Cancel, Help

The completion is instantly recorded, and reflected to all users of the system. The inset window shows how task information is updated in the same view to display completion information.



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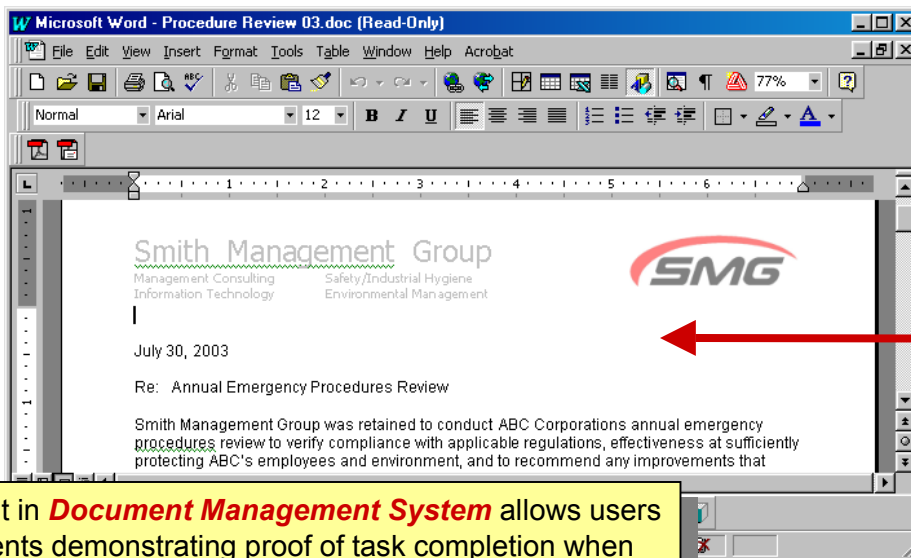
Completion Proof...

Task due 10/15/2000

Task	Completion	Notes	Corrective Actions
Completion Status	% Complete	Completed On	
Complete	100	07/30/2003	
Completed By	Actual Cost	Actual Hours	
Project Engineer	0	4.0	
Verification This completion has not been verified. <input type="button" value="Verify..."/>			
<input type="button" value="Documents..."/> Display list of documents related to this completion.			
<input type="button" value="Print"/>	<input type="button" value="OK"/>	<input type="button" value="Cancel"/>	<input type="button" value="Help"/>

Documents for Task Due 10/15/2000

Document Name	User	Modified
Procedure Review 03.doc		07/30/2003

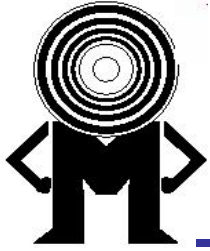


OrgMan's built in **Document Management System** allows users to link documents demonstrating proof of task completion when recording basic completion information.

These documents might include completed inspection checklists, copies of correspondence, data in spreadsheets or databases, etc. **Documents from any software application** installed on user machines may be associated with a task completion for easy future reference.



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Corrective Action...

The screenshot displays the 'Task due 10/15/2000' window with the 'Corrective Actions' tab selected. A table lists a corrective action with the following details:

Status	Due Date	Description
Not started	07/30/2003	Add new production line to emergency re...

The 'Corrective Action' dialog box is open, showing the following fields:

- Description of Required Action: Add new production line to emergency response procedures.
- Target Date: 08/21/2003
- Responsible Resource: Project Engineer
- Requested By: Project Engineer

The 'Correction' tab in the dialog box contains the following information:

Completion Status	% Complete	Corrected On
Not started	0	07/30/2003

Additional fields include 'Corrected By', 'Actual Cost', and 'Actual Hours', all currently empty or zero. A validation message states: 'The completion of this corrective action has not yet been validated.' Buttons for 'Print', 'OK', 'Cancel', and 'Help' are visible at the bottom of the dialog.

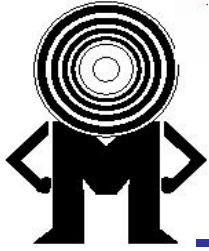
Sometimes completing a regularly scheduled task results in additional follow-up or corrective/preventive tasks that need to be completed. **OrgMan** allows users to request these **Corrective Actions** while they are recording the original task's completion.

Corrective Actions are entered by providing a description, assigning a target date & responsible party. In addition, documents can be linked to the **Corrective Action** for reference.

Open **Corrective Actions** are tracked in **OrgMan** just like tasks, until the appropriate correction is made - and completion information is entered as with a Task.



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OrgMan Web...

OrgMan 2.0

BACK FILTER CUSTOMIZE HELP

Scheduled Tasks

Show requirements, tasks, or actions with: All tasks, regardless of status where tasks are due on or after 7/31/2003 and tasks are due on or before 7/31/2003.

Items 1-2 of 2 ([click here to show all](#))

Due Date	Status	Completion Date	Actions Required	Requirement Name	Compliance Unit
7/31/2003	Not started		No	Hazard Communication (HazComm) Training	Walle
7/31/2003	Not started		No	Hazard Communication (HazComm) Training	Action

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Task Completion

Task Information

Annual Inventory and Emissions Statement (AIMS) / Emissions Inventory System (EIS) (Double H Boot; assigned to Raymond, Peter L; due 3/1/2003)

Due Date: , 2003

Resource: Raymond, Peter L

Completion Status

Status: % Complete:

Completed On: , 2003

Completed By: Raymond, Peter L

Actual Cost: Actual Hours:

Notes:

Verification

Verified: Yes No

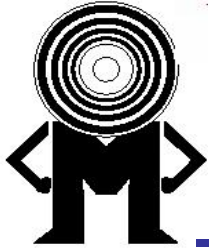
Verified On: , 2003

(no resource selected)

OrgMan Web makes available all of the basic (non-administrative) functionality that is available in the **OrgMan** Windows application - **right from your web browser**. This includes sorting and viewing tasks in a variety of ways, entering completions, evaluating the overall team effort, and so on.

OrgMan Web is extremely valuable in organizing larger teams, and significantly reduces the complexity of implementing **OrgMan** in your organization. **Plus, it means that your whole team to evaluate what needs to be done from any computer with access to the Internet.**

(**OrgMan Web** is only available with the Enterprise configuration.)



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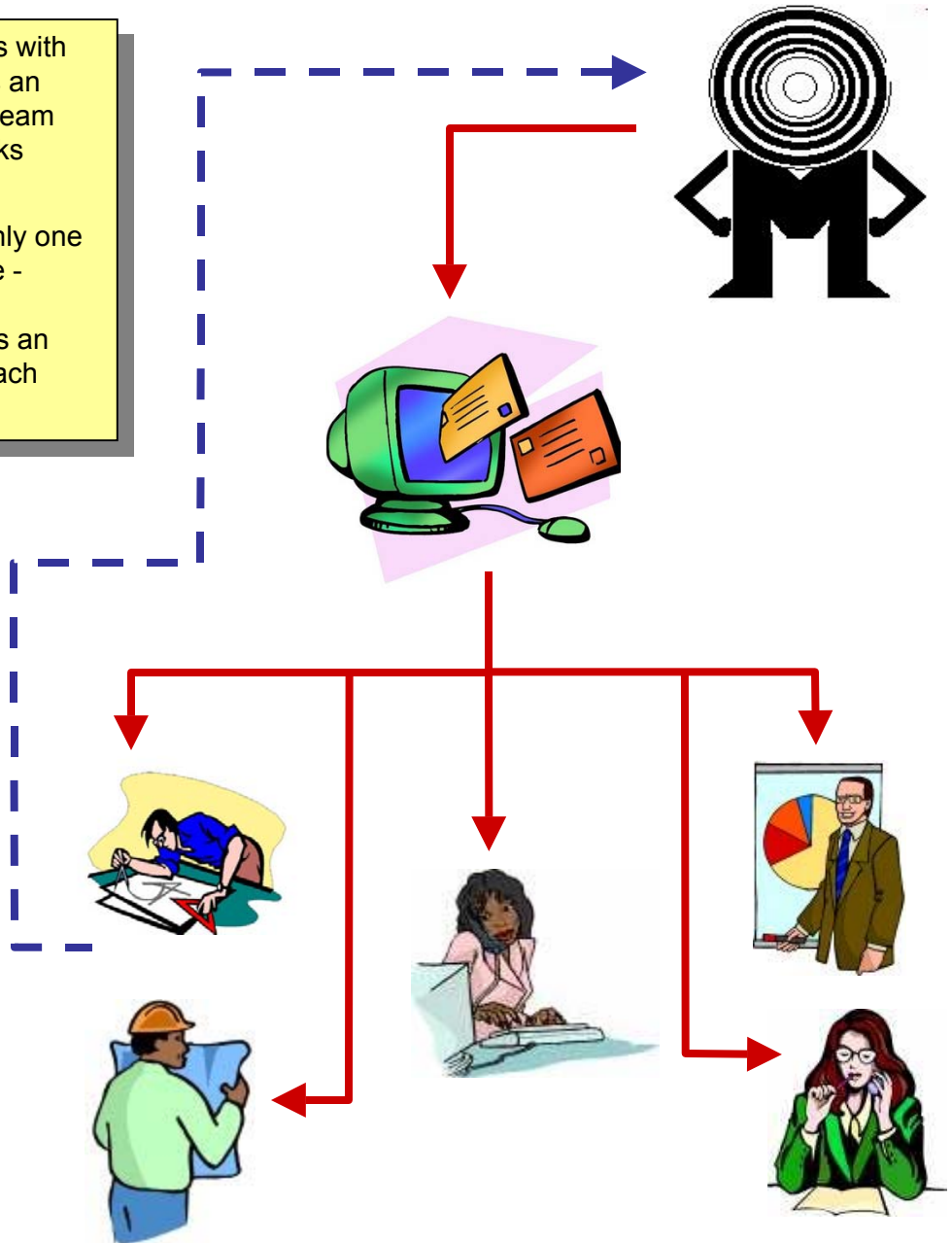
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Email Utility...

OrgMan Enterprise comes with an **Email Utility** that sends an email reminding assigned team members of upcoming tasks before the due date.

Some tasks may require only one or two days advance notice - others may require several months. **OrgMan** manages an appropriate lead time for each task.

This email prompts the team member to return to **OrgMan** and prepare to complete the task - **minimizing the number of late completions & eliminating excuses for inaction.**



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