

**Generating Maintenance Work Orders**

The Preventive Maintenance module creates work orders according to the records in the Maintenance capsule.

When the **Generate Work** operation is run, the system calculates whether or not a new work order is needed based upon the information in the *Dates* section of the Maintenance records.

Commencement Date:	January 1, 2011	<input type="checkbox"/> Inactive
Last Scheduled Date:	March 1, 2012	
Last Maintained Date:	February 23, 2011	
Next Date:	April 1, 2012	
Termination Date:	November 13, 2012	
Source For Generating:	Last Scheduled Date	
Frequency:	1 Months	
	<input type="checkbox"/> Weekdays Only	

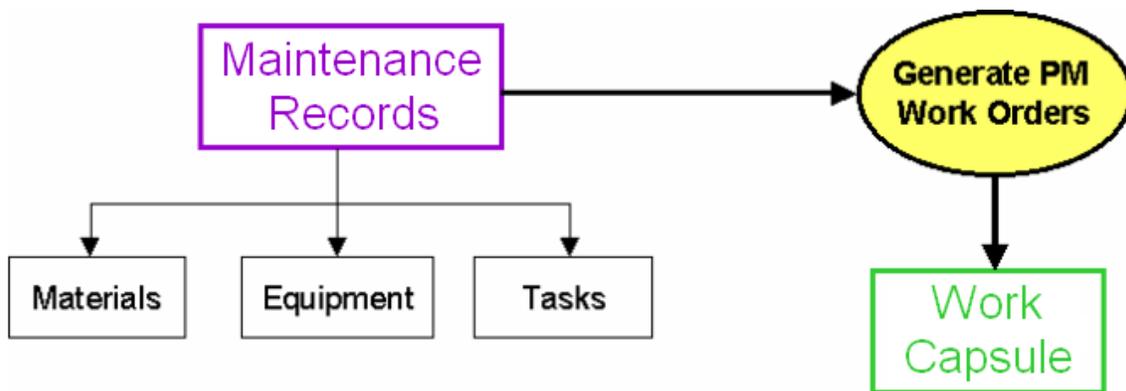
The system adds the frequency to the value that is selected as the **Source For Generating**.

If the resulting date falls within the date entered into the **Generate Work** search window, the system will create a work order.

In the example above, the system will create the next work order for April 1, 2012; one month from the Last Scheduled Date.

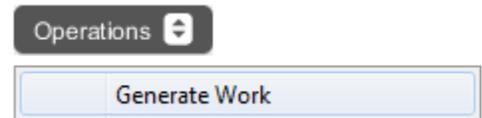
**Note:** If the *Last Scheduled* and *Last Maintained* dates are empty (during the initial set up of the system) JXT will create the first work order based upon the *Commencement Date*.

Once the work orders are generated they appear in the same capsule as all of your other work orders.



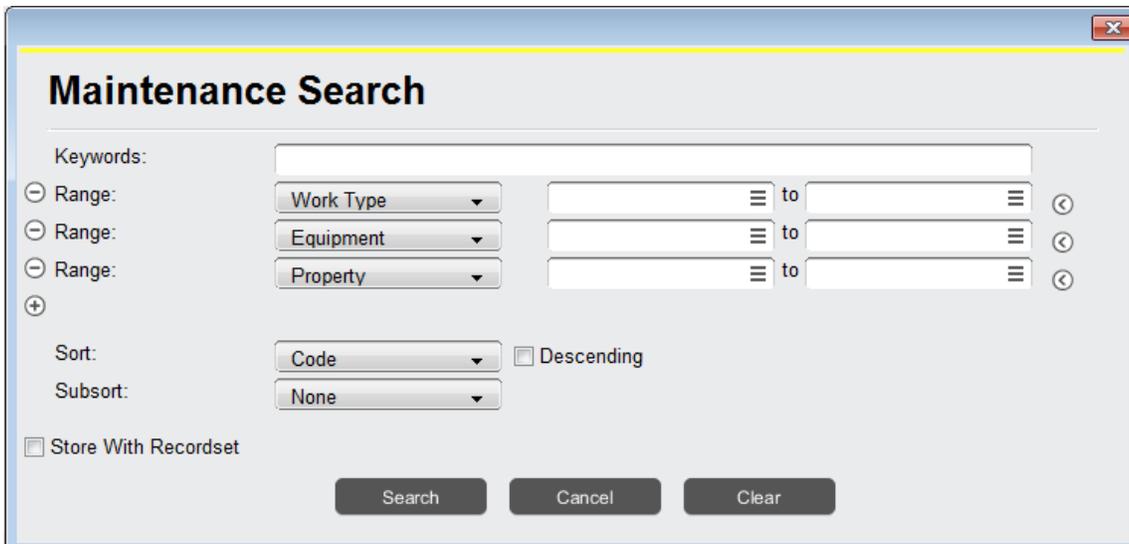
**Generating Work**

The Generate Work feature is found on the Operations menu of the Maintenance capsule. The first step is to open up the Maintenance List viewing all the Maintenance records that you want to generate.



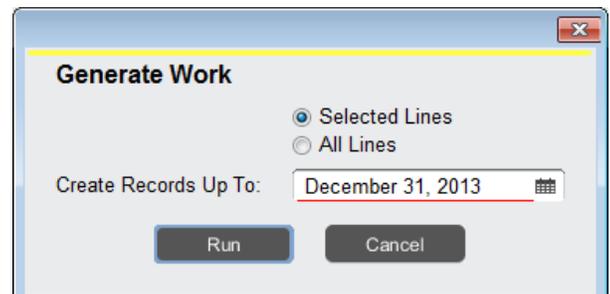
1. Right-click on the Maintenance capsule icon and select **Open by Search**.
2. In the Maintenance Search window, enter the criteria for the maintenance work you want to generate. If you want to generate all of your Maintenance work at once leave the search criteria blank (if there are stored searches use the Clear button to reset the search)

Typical search criteria include *Work Type*, *Equipment*, or *Property*.



3. You will be taken to a list window showing all Maintenance records matching the search criteria.
4. If you only want to generate work from a subset of the records appearing in the list, highlight those records and select **Operations**→**Generate Work**. Otherwise, you can leave all records unselected to include them all.
5. Enter the date you want to generate maintenance work through. If you generate weekly, put in the last date of that week. If you generate each month, put in the last day of the month.

If you selected specific records prior to running the operation, make sure Selected Lines is selected. Otherwise, select All Lines.



This operation will go through all Maintenance records included in the operation. For each record, it will add the Frequency to the date specified as the Source For Generating. If the resulting date falls within the date entered in the Generate Work window, a work order will be generated from that maintenance record.

- You will be taken to a screen report showing a preview of the work to be generated. For each work order, it lists the *Maintenance* record it was generated from, *Work Status*, *Date Scheduled*, *Equipment*, *Work Type*, and *Description*.



**Generate Work Preview**  
**DIG Property Group**  
 50 Congress Street  
 Boston, Massachusetts 02109

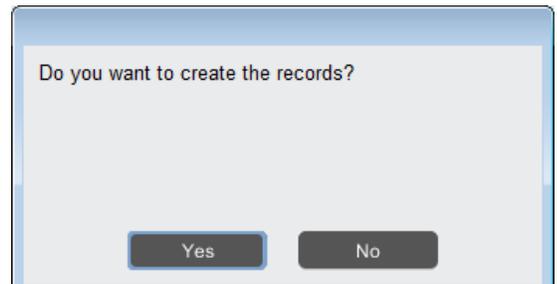
Maintenance	Scheduled	Equipment	Work Type	Description
AHU-01-A2	Aug 6 12	AHU-01	PM	Annual Air Handler Maintenance AHU-01
AHU-01-A2	Sep 6 12	AHU-01	PM	Annual Air Handler Maintenance AHU-01
AHU-01-A2	Oct 8 12	AHU-01	PM	Annual Air Handler Maintenance AHU-01
AHU-01-A2	Nov 8 12	AHU-01	PM	Annual Air Handler Maintenance AHU-01
AHU-01-A2	Dec 10 12	AHU-01	PM	Annual Air Handler Maintenance AHU-01
AHU-01-A2	Jan 10 13	AHU-01	PM	Annual Air Handler Maintenance AHU-01

Records printed: 6

Review the preview report closely to check:

- Date Scheduled
- Total number of work orders to be generated (in the lower left-hand corner of the report)

- When you close this preview you will be prompted to either generate the work or cancel the operation. Click **Yes** to generate the work.



- The Work List window will open with the newly created records listed.

**Work List**         

Division	Number ▲	Work Status	Time Ente	Description	Time Rec	Date Ente	Work Typ	Date Sch	Ti
100BE	12-100153	OPEN	12:23	Annual Air Hand...	12:23	Novem...	PM	August...	00
100BE	12-100154	OPEN	12:23	Annual Air Hand...	12:23	Novem...	PM	Septe...	00
100BE	12-100155	OPEN	12:23	Annual Air Hand...	12:23	Novem...	PM	Octobe...	00
100BE	12-100156	OPEN	12:23	Annual Air Hand...	12:23	Novem...	PM	Novem...	00
100BE	12-100157	OPEN	12:23	Annual Air Hand...	12:23	Novem...	PM	Decem...	00
100BE	12-100158	OPEN	12:23	Annual Air Hand...	12:23	Novem...	PM	Januar...	00

**Errors During Generation**

If any of the fields on a Maintenance record are inactive, or any required fields are blank, it will not create a work order from that record. Instead, prior to the system asking if you want to generate you will see an error report stating which values prevented the work order(s) from being created.

Print this report (so you know which PM's need to be corrected). The system will ask you if you want to continue. Answer **Yes**, and then continue generating the remaining PM's. Then go back and fix the incomplete records and rerun the **Generate Work** routine.



**Error**  
**DIG Property Group**  
 50 Congress Street  
 Boston, Massachusetts 02109

	Last Maintained Date	Next Date	Assigned To Link	Description
Error	February 1, 2009		Worker	Annual Air Handle
AHU-01-A: Is Inactive	February 1, 2009		Worker	Annual Air Handle
AHU-01-A: Source For Generating Is Readin	July 6, 2012	January 10, 20...	Worker	Annual Air Handle
	February 23, 2011	April 1, 2012	Worker	Annual Air Handle
Records printed: 2	April 15, 2011	May 1, 2012	Worker	Quarterly Air Han
	April 15, 2011			ual Air h
	January 9, 2009			r Handle
	November 2, 2009			Air Han
	July 20, 2009			ual Air h
	October 1, 2010			t Handle
	October 12, 2008			Air Han
	August 15, 2008			ual Air h
	August 23, 2012			

Do you want to continue?

Yes
No