

Generating Maintenance Work Orders

The Preventive Maintenance module creates work orders according to the schedules laid out in the Maintenance capsule.

Users now have two options for generating Work via Maintenance – they can set up Auto-generate Work, or they can manually generate Work using an operation in the Maintenance list. It is possible to allow certain records to Auto-generate Work, while requiring that others are manually generated. With either of these processes, the system calculates whether or not a new Work Order is needed based upon information in the *Dates/Frequency* section of Maintenance records.

Dates and Frequency in Maintenance Records

There are several ways AwareManager JXT can calculate the Next Date of a Maintenenace record. By selecting the Source for Generating, users can choose if they would like the Next Date of a Maintenance record to be calculated based on:

- Last Scheduled Date
- Last Maintained Date
- Weeks once a week, once every other week, etc.
- Day and Week Every third Friday of the month, every second Monday of the month, etc.
- Readings Exception If a reading falls below a pre-set lower limit, or is above a pre-set upper limit, a reactive Work Order will be created when you run the Generate Work by Readings Exception operation in the Work Capsule

Commencement Date:	January 1, 2014		Inactive
Last Scheduled Date:	July 12, 2015	**	
Last Maintained Date:	July 6, 2015	**	
Next Date:	August 9, 2015		
Termination Date:		**	
	Auto-generate Work		
Source For Generating:	Day And Week	¥	
Day Of Week:	Sunday	¥	
Week Of Month:	2	~	
Stop Month/Day:	None 🗸 0		
Restart Month/Day:	None 🗸 0		
Time To Schedule:	10:00	6	

Above: the system will create the next work order for August 9, 2015 because it is the second Sunday in the month of August

Note: the Auto-generate Work feature is not yet able to automatically generate work when the Source for Generating is Readings Exception

The system adds the frequency to the value that is selected as the Source For Generating. If the resulting Next Date falls within the parameters set in the Generate Work search window or the Lead Time defined in Maintenance Preferences, Work will be generated for that Maintenance record.

If the Last Scheduled and Last Maintained dates are blank, JXT will create the first work order based upon the Commencement Date. Once the Work Orders are generated, they appear in the Work capsule along with all of your other Work Orders.

Auto-generate Work

Auto-generate Work allows you to set up Maintenance schedules and leave them to generate new Work automatically, as opposed to having to generate them manually. To set this up, first go to **Maintenance Preferences**.



Generating Maintenance Work

Quick Reference

 Go to Maintenance Preferences: right-click the Maintenance capsule and select Preferences from the drop-down list



- Edit Preferences
 - o Activate the Auto-generation Timer, which generates the new Work Orders every day at midnight.
 - Set the Lead Time. Lead Time defines how far ahead the system will search for Maintenance with an upcoming Next Date (i.e. if the lead time is set to 10 Days, Work will be generated for any Maintenance record with a Next Date in the coming 10 days).
- Save changes

Maintenar	ice Preferences 💾 🖉	
Singular Term:	Maintenance	
Plural Term:	Maintenance	
New Focus:	Code 🗸	
Record Limit:	0	
Recordset Limit:	0	
< Extra Custom	Fields Mandatory Fields Upper Case Fields Fields To Clear On Duplicate Information	

- Select the Maintenance records you would like to automatically generate work. There are two ways this can be done, you must access the Maintenance List for both options:
 - Several records
 - Add the Auto-generate Work column
 - Highlight records you would like to use to Auto-generate Work
 - Use the pencil in the Auto-generate Work column to update the records and Save

Mainte	enanc	e List			R Q B		₽₩	Operations ᅌ
Code	Unit 💉	Equipment 💉	Auto-generate Work 📝	Last Maintained Date 💉	Next Date 🔺	Day Of Week	🖊 Frequency 🏒	Frequency Period 📝
AUTO GEN 07	BB-0050	GEN-02-BB		July 6, 2015	August 9, 2015	Sunday	1	Months
AUTO GEN 01	BB-0050	GEN-01-BB		July 23, 2015	August 10, 2015	Sunday	2	Weeks
AUTO GEN 10	BB-0050			July 13, 2015	August 10, 2015	Monday	1	Months
TESTAUTOGEN7	BB-0050	GEN-02-BB		July 10, 2015	August 14, 2015	Friday	3	Months
TESTAUTOGEN8	BB-0050	GEN-03-BB		May 5, 2015	August 17, 2015	Monday	3	Months
AUTO GEN 03	BB-0050	GEN-03-BB		Janua		— × —	1	Months
PC-101-003-M	BB-2000	PC-101		May 2		Manufa .	3	Months
TESTAUTOGEN4	BB-0050	GEN-01-BB		Janua Change A	luto-generate v	vork	1	Months
AUTO GEN 09	BB-0050	PC-101		Augu: 🗸 Auto-gene	erate Work		1	Months
TESTAUTOGEN5	BB-0050	GEN-02-BB		Janua			3	Months
TESTAUTOGEN3	BB-0050	GEN-03-BB		Janua Save	Cancel		3	Months
TESTAUTOGEN6	BB-0050	GEN-03-BB		May 5		_	3	Months
AUTO GEN 06	BB-0050	GEN-02-BB		January 15, 2015	March 7, 2016	Sunday	1	Months
AUTO GEN 04	BB-0050	GEN-03-BB		April 5, 2015	April 5, 2016	Sunday	1	Years



- Individual record
 - Open an individual Maintenance Record in change mode
 - Select the Auto-generate Work checkbox

Code:	AUTO GEN 07	OPS	Commencement Date:	January 1, 2014		Inactive
Equipment:	GEN-02-88	Emergency Generator	Last Scheduled Date:	Last Scheduled Date: July 12, 2015 Last Maintained Date: July 6, 2015		
Equipment Type:	GEN	Generator	Last Maintained Date:			
Contract:			Next Date:	August 9, 2015		
Assigned To:			Termination Date:		10	
Building:	88	Big Building		Auto-generate Wo	rk	
<u>Unit:</u>	BB-0050	Unit 50 (Engineering O	Source For Generating:	Day And Week		
Floor:	B		Day Of Week:	Sunday		
Room:	-		Week Of Month:	2		
Contact:			Stop Month/Day:	None	0	
Tenant:	*MGMT	Management Office	Restart Month/Day:	None	0	
Department:			Time To Schedule:	10.00		
Description:	Test auto-generation A	UTO GEN 07 - Do not	Notes:			
Week	Touch		Work notes from GEN-0 Belt Qty/Size: 3 / 24x24 Filter Qty/Size: 2 / 24x2 Fed From: power source	12-88 record: 15x27 9		
C Defaults Other	Links Additional Amounts	Naterials Tasks External Files	Reminders			

Generate Work Operation

The Generate Work feature is found on the Operations menu of the Maintenance capsule. The first step is to open up the **Maintenance List**.

Maintenance	alist 🖀 🖹 🕂 🗈 🖊	╔╓┇┇┛┇┋┇╓╝┇	
Code ▲ AUTO GEN 01 AUTO GEN 03 GEN-01-BB-M GEN-02-BB-M GEN-03-BB-M HVAC-OT-CLENT-A HVAC-OT-CLENT-A HVAC-CT-CLENT-C MONTHLY GEN CHECK PC-101-003-M PC-102-003-M PC-102-002-Y SUITE-1W W	Description Test auto-generation AUTO GEN 01 Test auto-generation AUTO GEN 03 Test auto-generation AUTO GEN 03 Test auto-generation GEN-01-88-M - D Test auto-generation GEN-03-88-M - D Test auto-generation GEN-03-88-M - D Overtime HVAC request: Every Saturd Overtime HVAC request: Every Saturd Overtime HVAC request: Every Saturd Monthly Generator Check		Generate Work Copy Tasks Add Tasks Copy Materials Refresh Equipment Data Preview Work Show Empty Maintenance Maintenance Projections Report Material Projections Report Maintenance Expanded Report
Visible: 14 Hidden: 21 Se	elected: 0 Available: 35	R	efreshed At: 15:06:33

- Access the Maintenance List by searching, using a Recordset, or opening the Maintenance capsule with maximum records (if you do not recognize any of these options, refer to documentation related to Search, Basics, and Search-based Recordsets)
- Once you are in the Maintenance List, either select specific records by highlighting them in the list or do not select any records. You will have the option to include all records in the list in the Generate Work search window
- Go to **Operations**→**Generate Work**

Generating Maintenance Work

Quick Reference

• Enter the **Create Records Up To** date – the date through which you would like to generate Maintenance Work (i.e. if you generate weekly, put in the last date of that week, etc.)

AWAREMANAGER

	×
Generate Work	
	 Selected Lines All Lines
Create Records Up To:	<u> </u>
Run	Cancel

This operation will go through all Maintenance records included in the selected group. For each record, it will calculate the Next Date. If the resulting Next Date falls between the current date and the **Create Records Up To** date, from the Generate Work search window, Work will be generated for that Maintenance record.

- The system will show you a preview report of the work to be generated, unless there are errors preventing the generation (in which case see the Errors during Generation section below)
 - Review the preview report closely to check that the Date Scheduled is accurate and that it is the correct total number of work orders to be generated (in the lower left-hand corner of the report)

enerate Work	Preview			
AWAREMAN	A G E R	Gene 50 Cc	erate Work Preview AwareManager ongress Street, Suite 630 Boston, MA 02109	
Maintenance	Scheduled	Equipment	Work Type	Description
AUTO GEN 01	Aug 10 15	GEN-01-BB	PM	Test auto-generation AUTO GEN 01 - Do not touch
AUTO GEN 01	Aug 24 15	GEN-01-BB	PM	Test auto-generation AUTO GEN 01 - Do not touch
ALITO GEN 02	Aug 23 15	GEN-02-BB	PM	Test auto-generation AUTO GEN 02 - Do not

- When you print/save or close this preview you will be prompted to either generate the work or cancel the operation. Click **Yes** to generate the Work records
- The Work List window will open to show the newly generated records

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Work	List 🌰 🗎) 🕂 🗈 🗡 (Q 🖪 🖸	: ⊞ 🗏 📮 🖾 🖽	Operations 🖨]	
Number	Equipment	Maintenance	Building	Assigned To	Date Scheduled	Work Type	Work Status	_
B02300	PC-102	PC-102-003-M	PRIVATE 2	DLSJ	August 1, 2015	PM	OPEN	•
B02232		HVAC-OT-CLIENT-A	BB	RTC	August 3, 2015	OT HVAC	OPEN	
B02292		HVAC-OT-CLIENT-C	BB	RTC	August 3, 2015	OT HVAC	OPEN	
B02301	PC-102	PC-102-003-M	PRIVATE 2	DLSJ	August 3, 2015	PM	OPEN	
Visible: 46 H	lidden: 128 Selected	I: 0 Available: 2313					Refreshed At:	16:09:44



Errors during Generation

If any errors occur during the generation process, Work for the Maintenance record with the error will not be generated, and you will be shown a report listing the specific record(s) affected as well as a description of the actual error.

Error 📮		
		(
•	Error	
A A A A A A A A A A A A A A A A A A A	AwareManager	
AWAREMANAGER	50 Congress Street, Suite 630	
	Boston, MA 02109	
From		
PC-103-002-Y: Related Equipment is inactive		
SUITE-1W: Source For Generating Is Readings Exception		
Records printed: 2		

When you print/save or close out this report, you will be asked if you would like to continue:

- Select Yes to generate Work from the Maintenance records without any errors
- Fix the affected records
- Repeat the Generate Work process for the records that were not generated