

PM Reports

There are a number of reports located on the Operations menu of the Maintenance list that can be used to create reports to fit your needs.

Maintenance List            Operations ▾

Code ▲	Equipment	Last Maintained Date	Next Date	Description
AHU-01-A	AHU-01	February 1, 2009		Annual Air Handler Maintenance AHU-01
AHU-01-A2	AHU-01	July 6, 2012	January 10, 2013	Annual Air Handler Maintenance AHU-01
AHU-01-ATE...	AHU-01	February 23, 2011	April 1, 2012	Annual Air Handler Maintenance AHU-01
AHU-01-Q	AHU-01	April 15, 2011	May 1, 2012	Quarterly Air Handler Maintenance AHU-01
AHU-01-S	AHU-01	April 15, 2011	August 1, 2012	Semi Annual Air Handler Maintenance AHU-01
AHU-02-A	AHU-02	January 9, 2009	January 9, 2013	Annual Air Handler Maintenance AHU-02
AHU-02-Q	AHU-02	November 2, 2009	May 1, 2012	Quarterly Air Handler Maintenance AHU-02
AHU-02-S	AHU-02	July 20, 2009	August 1, 2012	Semi Annual Air Handler Maintenance AHU-02
AHU-03-A	AHU-03	October 1, 2010	February 1, 2013	Annual Air Handler Maintenance AHU-03
AHU-03-Q	AHU-03	October 12, 2008	May 1, 2012	Quarterly Air Handler Maintenance AHU-03
AHU-03-S	AHU-03	August 15, 2008		Semi Annual Air Handler Maintenance AHU-03

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

Preview Work

This displays a preview of the Work report based upon the highlighted record in the list. Note the Work record has not been created yet; there is a “?” instead of an actual Work Number.



Work Order
DIG Property Group
50 Congress Street
Boston, Massachusetts 02109

Division: 100BE
Phone: 617-542-8555 Fax: 617-542-8860



Work Number
?

<p>Work Type: PM</p> <p>Description: Annual Air Handler Maintenance AHU-01</p> <p>Priority: 3-LOW</p> <p>Department: Engineering (ENG)</p> <p>Project: Yearly PM (1Y)</p> <p>Property: 100 Beacon Street North Tower (100-N BEAC)</p> <p>Address: 100 Beacon Street Boston, MA 02109</p> <p>Unit: 3rd floor ladies room (100-N BEAC-03LR)</p> <p>Floor: 3</p> <p>All Tasks Compl... No Yes</p> <p>Custom Field Ch... No Y</p> <p>Subtask: No Yes</p> <p>Equipment: AHU-01 (Air Handler 1)</p> <p>Equip Type: Air handler (AHU)</p> <p>Serial Number: 21151151M55</p> <p>Maintenance Code: AHU-01-A</p> <p>Tasks: LOCKOUT</p> <p style="font-size: small;">Description Equipment Lock Out/Tag Out Perform Equipment Lock Out / Tag Out Procedures</p>	<p>Entered By: AMJXT</p> <p>Received: Nov 13 12 @ 12:51</p> <p>Printed: Nov 13 12 @ 12:51</p> <p>Status: OPEN</p> <p>Required: Nov 13 12 @ 12:51</p> <p>Scheduled: Nov 13 12 @ 12:51</p>
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1. Notify all affected employees that a lockout is required and the reason therefor.

2. If the equipment is operating, shut it down by the normal stopping procedure (such as depress stop button, open toggle switch).

3. Operate the switch, valve, or other energy isolating devices so that the energy source(s) (electrical, mechanical, hydraulic, other) is disconnected or isolated from the equipment. Stored energy, such as that in capacitors, springs, elevated machine members, rotating fly wheels, hydraulic systems, and air, gas, steam or water pressure, must also be dissipated or restrained by methods such as grounding, repositioning, blocking, bleeding down.

Maintenance Projections Report

This search-based report is designed to display the scheduled maintenance by month, according to the entered date range. The report will display the estimated hours.

														
Maintenance Projections Report DIG Property Group 50 Congress Street Boston, Massachusetts 02109														
Start Date: January 1, 2013														
Equipment	Month:	January	February	March	April	May	June	July	August	September	October	November	December	Line Totals
INSPECT														
BS-1-000-D		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
INSPECT														
BS-1-000-D2		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
PM - Preventive Maintenance														
PRE-MAINT AIR FILT...		3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	36.00
		3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	36.00
Report Totals:		3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00	36.00
Records printed: 3														

Material Projections Report

This search-based report is designed to display the materials required for completion of the Maintenance records based upon search criteria and an entered date range.

			
Material Projections Report DIG Property Group 50 Congress Street Boston, Massachusetts 02109			
Search Ranges:		Projection Date: June 13, 2012 to December 31, 2012	
Material Type	Material Type Description	Quantity On Hand	Quantity
Material Code	Description		
ELEC			
ELEC-SOCKET #450	Electrical Supplies Electrical Socket #450	211,155.000	120.00
HVAC			
BELT-45TLSJ5	HVAC Supplies 45TLSJ5 Belt	75.000	2.00
FIL-24X20X2	24X20X2 Pleated Filter	222.000	46.00
FIL-40X40	40 x 40 Media Roll Filter	118.000	240.00
TSTAT-550	Thermostat 550	17.000	0.00
The data for this report was accumulated from the following Maintenance records (the number of projected Work records are in parenthesis): AHU-01-A (5), AHU-01-A2 (5), AHU-01-ATEST (7), AHU-01-Q (3), AHU-01-S (1), AHU-02-A (1), AHU-02-Q (2), AHU-02-S (1), AHU-03-A (1), AHU-03-Q (2), AHU-03-S (0), BS-1-000-D (6), BS-1-000-D2 (6), CT-1-Q (1), CT-2-Q (3), EXCEPTION 2 MAINT (6), TEMP READINGS EXC (6)			
Records printed: 5			

Maintenance Expanded Report

This report prints based upon data in the list. It includes the entire Description, Notes, and the Task, and Material details.



Maintenance Expanded Report

DIG Property Group
50 Congress Street
Boston, Massachusetts 02109

Division	Code	Equipment	Last Maintained Date	Next Date	Assigned To Link
100BE	AHU-01-A2	AHU-01	July 6, 2012	January 10, 2013	Worker
<p><i>Description:</i> Annual Air Handler Maintenance AHU-01 <i>Notes:</i> Notes to print on work orders <i>Tasks:</i> Description LOCKOUT Perform Equipment Lock Out / Tag Out Procedures</p> <ol style="list-style-type: none"> 1. Notify all affected employees that a lockout is required and the reason therefor. 2. If the equipment is operating, shut it down by the normal stopping procedure (such as: depress stop button, open toggle switch). 3. Operate the switch, valve, or other energy isolating devices so that the energy source(s) (electrical, mechanical, hydraulic, other) is disconnected or isolated from the equipment. Stored energy, such as that in capacitors, springs, elevated machine members, rotating fly wheels, hydraulic systems, and air, gas, steam or water pressure, must also be dissipated or retained by methods such as grounding, repositioning, blocking, bleeding down. 4. Lockout energy isolating devices with an assigned individual lock. 5. After ensuring that no personnel are exposed and as a check on having disconnected the energy sources, operate the push button or other normal operating controls to make certain the equipment will not operate. CAUTION: Return operating controls to neutral position after the test. 6. The equipment is now locked out. <p>TOOLS AND SUPPLIES: Chlorine bleach (IAQ) Isopropyl alcohol (IAQ) Simple green degreaser (IAQ) Acti-Klean AK-5 non-acid coil cleaner (IAQ) Hand sprayer (IAQ) Hose (IAQ) Soft brush (IAQ) Wet-vac (IAQ)</p> <p>PROCEDURE:</p> <ol style="list-style-type: none"> 1. INDOOR AIR QUALITY MAINTENANCE (IAQ). <i>Note:</i> This procedure must be performed after-hours. 					
AHU-A					

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On the Operations menu of the Equipment list there is also an **Equipment History Report**.



Equipment History Report

DIG Property Group
50 Congress Street
Boston, Massachusetts 02109

Search Ranges: Equip Type: Starting From CHAIR
Date: to

Equipment Work	Property Date	Unit Category	Equipment Type Work Type	Model Done By	Description Description	Serial Number
Division: Global						
C-10	Global Property		CHAIR			C-10
0611	Mar 22 11		CARPENTRY	CDC		
12-100097	Oct 11 12	SVS-BO	CARPENTRY	CDC	Carpentry	
Notes: Duplicated from 0611.100BE						
C-2	Global Property		CHAIR			C-2
No details						
C-4	Global Property		CHAIR			C-4
0636	Jun 30 11	SVS	MOVE			

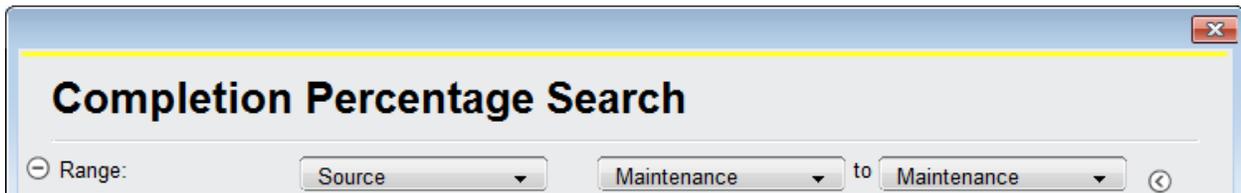
Equipment Printed: 3

This report lists equipment details, for each piece of equipment, (including Location, Equipment Type, Model/Serial Number, Description, and Notes) as well as details from all work orders linked to the equipment (including Work Number, Type, Done By, Description, and any readings linked to the WO).

Remember: Keep in mind, once your PMs are generated into Work orders, all work reports can be used as PM reports from the Work list. In the search window, use the Source field to bring up Maintenance to Maintenance. This (in addition to any other search criteria you entered) will bring up a list of all Work records that were created from the Maintenance capsule.

Completion Percentage Report

A great example of a Work report that could be extremely helpful when viewing PM information is the **Completion Percentage Report**.



This search-based report is found on the Operations menu of the Work list. It summarizes the number of work orders by your selected sort (Work Type, Assigned To, Department, or Client). It displays the number of work records entered, completed, and closed and the corresponding percentages.

AwareManager jxt		Completion Percentage by Work Type					
		DIG Property Group					
		50 Congress Street					
		Boston, Massachusetts 02109					
Search Ranges:		Date Entered: February 6, 2008 To April 15, 2011					
		Work Type: LIGHTS To WINDOWS					
Work Type	Description	Quantity Entered	Quantity Completed	Percent Completed	Quantity Closed	Percent Closed	
LIGHTS	Replace Lights	10	6	60%	3	30%	
MED-COMM...	Medical Command Log	1	0	0%	0	0%	
MOVE	Moves	7	2	29%	3	43%	
OTHER	Other678901234567890...	13	0	0%	0	0%	
PAINT	Painting	9	0	0%	1	11%	
PAINTING		5	1	20%	1	20%	
PEST	Pest Control	9	2	22%	4	44%	
PLUM-LEAK		1	1	100%	0	0%	
PLUMB	Plumbing	17	8	47%	12	71%	
PM	Preventive Maintenance	41	20	49%	19	46%	
REPAIR		1	0	0%	0	0%	
SIGNAGE	Signage / Directory	3	3	100%	3	100%	
TEST	test description	17	0	0%	1	6%	
TEST-REAIING	Test WorkType with Read...	2	1	50%	2	100%	
TEST1	testing material types def...	1	0	0%	0	0%	
TRASH	Trash	8	4	50%	4	50%	
WINDOWS	Cleaning Windows	12	3	25%	3	25%	
		<u>157</u>	<u>51</u>	<u>32%</u>	<u>56</u>	<u>36%</u>	

Records printed: 17

You can easily narrow down your results to only Maintenance-generated records by including the *Source* field in your search criteria.