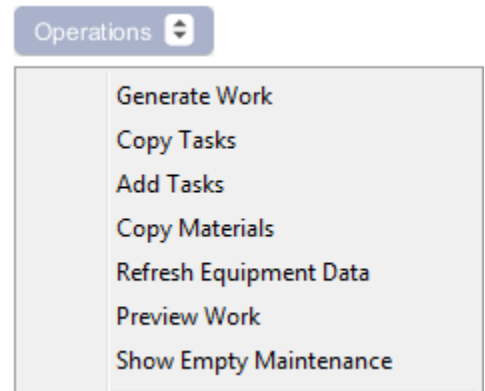## Maintenance Operations

Access these Operations by clicking on the Operations menu of the Maintenance List: Generate Work, Copy Tasks, Add Tasks, Copy Materials, Refresh Equipment Data, Preview Work, or Show Empty Maintenance.
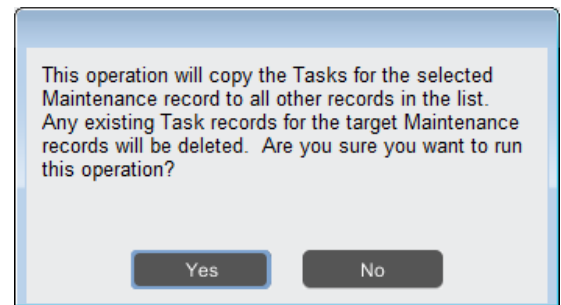
Operations ⬍

- Generate Work
- Copy Tasks
- Add Tasks
- Copy Materials
- Refresh Equipment Data
- Preview Work
- Show Empty Maintenance

Generate Work

For information on this topic, please see the separate document **Generating Maintenance WOs.**

Copy Tasks

This operation will copy the Tasks for a selected Maintenance record in the list to all other records in the list. It will overwrite any Task records listed on other records. This operation is helpful when setting up your maintenance records. For example: copying the Tasks from one record to all of those with the same Equipment Type and Frequency.
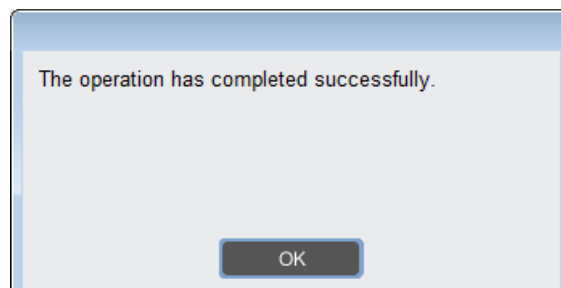
When this operation is selected, you will see the following window:

> This operation will copy the Tasks for the selected Maintenance record to all other records in the list. Any existing Task records for the target Maintenance records will be deleted. Are you sure you want to run this operation?
>
> Yes   No

The list of Tasks, associated with the selected record in the list, will be copied to all other records in the list.

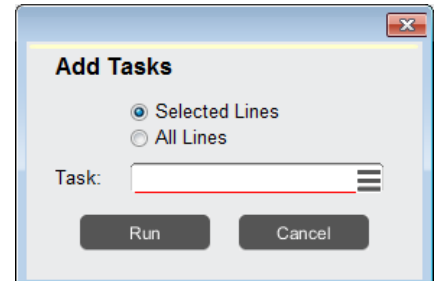| Custom Fields	Defaults	Other Links	Additional Amounts	Materials	Tasks	External	Reminders

Task	Notes
LOTS OF EQ	Do PM task X Y and Z
CT-Q	1. Check piping & gear box for signs of oil leaks. Repair if necessary - add a

When the operation is complete, you will see the following window:

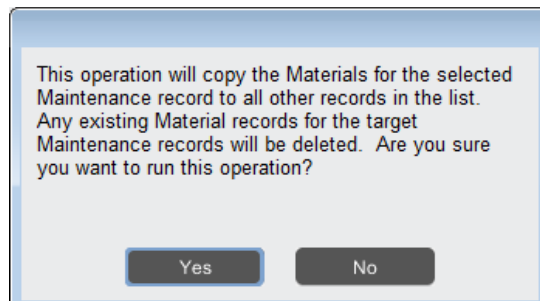> The operation has completed successfully.
>
> OK

Add Tasks

This operation allows you to select a Task record to add to all of the Maintenance records included (*Selected* or *All Lines*).

Copy Materials

This operation will copy the Materials for a selected Maintenance record in the list to all other records in the list. It will overwrite any Material records listed on other records. This operation is helpful when setting up your maintenance records. For example: copying the Materials from one record to all of those with the same Equipment Type and Frequency.
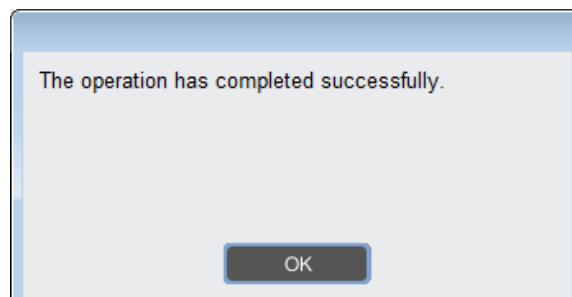
When this operation is selected, you will see the following window:

> This operation will copy the Materials for the selected Maintenance record to all other records in the list. Any existing Material records for the target Maintenance records will be deleted. Are you sure you want to run this operation?
>
> Yes   No

The list of Materials, associated with the selected record in the list, will be copied to all other records in the list.

| Custom Fields | Defaults | Other Links | Additional Amounts | **Materials** | Tasks | External | Reminders |

Material	Description	Quantity	Unit Price	Charge
LUMBER-2X4	Lumber - 2x4 (priced per foot)	0.000	2.8750	0.00
TT-OFF WHITE / …	True Test Off White Paint - Gallon	0.000	25.3000	0.00

When the operation is complete, you will see the following window:

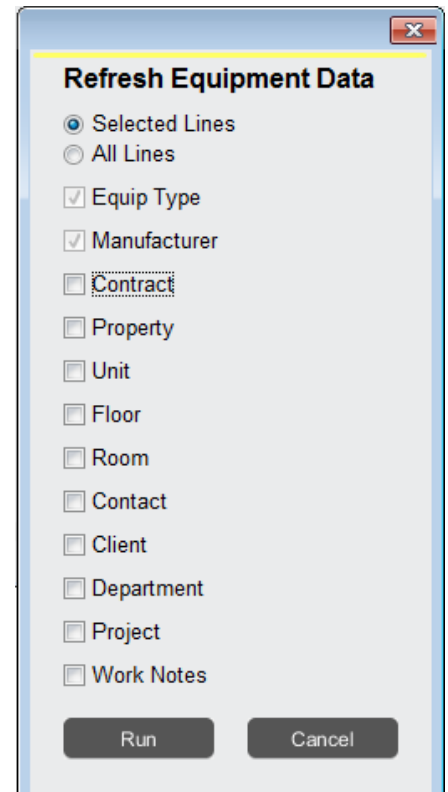> The operation has completed successfully.
>
> OK

Refresh Equipment Data

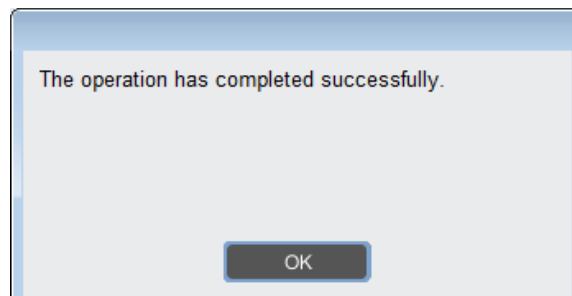This operation is used to update information on Maintenance records, based on its related Equipment records.

When this operation is selected, you will get the following window:
You may choose to run this operation on "Selected Lines" or "All Lines" and can then select the fields you would like to be included in this refresh.

Important Notes:

- Equipment Type and Manufacturer are a mandatory check

- The fields "checked" will be copied to the Maintenance record, unless they are blank on the Equipment record.

- Work Notes are copied to the Notes field of the Maintenance record, if selected and are not blank.

Refresh Equipment Data

- ⦿ Selected Lines
- ○ All Lines
- ☑ Equip Type
- ☑ Manufacturer
- ☐ Contract
- ☐ Property
- ☐ Unit
- ☐ Floor
- ☐ Room
- ☐ Contact
- ☐ Client
- ☐ Department
- ☐ Project
- ☐ Work Notes

Run   Cancel

After clicking the green checkmark, you will get the following message:

The operation has completed successfully.

OK

Preview Work

This operation allows you to see a preview of what a Maintenance record would look like after it has been generated into a Work record, by using the Generate Work Operation. (Note the Work has not yet been created; it displays "?" instead of a Work Number.) To use this operation, you must only have one line selected in the Maintenance list.

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

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

AwareManager | jxt

Work Number
?

Work Type:	**PM**	Entered By:	**AMJXT**
Description:	**Annual Air Handler Maintenance AHU-01**	Received:	**Nov 13 12 @ 12:51**
		Printed:	**Nov 13 12 @ 12:51**
Priority:	**3-LOW**	Status:	**OPEN**
Department:	**Engineering (ENG)**		
Project:	**Yearly PM (1Y)**	Required:	**Nov 13 12 @ 12:51**
		Scheduled:	**Nov 13 12 @ 12:51**
Property:	**100 Beacon Street North Tower (100-N BEAC)**		
Address:	**100 Beacon Street**		
	Boston, MA 02109		
Unit:	**3rd floor ladies room (100-N BEAC-03LR)**		
Floor:	**3**		
All Tasks Compl...	**No Yes**		
Custom Field Ch...	**No Y**		
Subtask:	**No Yes**		

Equipment:	**AHU-01 (Air Handler 1)**
Equip Type:	**Air handler (AHU)**
Serial Number:	**21151151M55**

Field	Value
VOLTAGE	**40.1234**
MOTOR-MFR	**GE**

Maintenance Code:	**AHU-01-A**
Tasks:	Description
LOCKOUT	**Equipment Lock Out/Tag Out**
	Perform Equipment Lock Out / Tag Out Procedures

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 restained by methods such as grounding, repositioning, blocking, bleeding down.

Show Empty Maintenance

This operation filters the current list window to allow the user to see fields that do not have detail in them. It will display checkboxes for each detail field that the user has access to on their standard form. If there are no detail tables empty, an error message will display.

Show Empty Maintenance Operation

Show records with the following empty detail records:

- ☐ Maintenance Amounts
- ☐ Maintenance Materials
- ☐ Maintenance Tasks
- ☐ Reminder

Run   Cancel