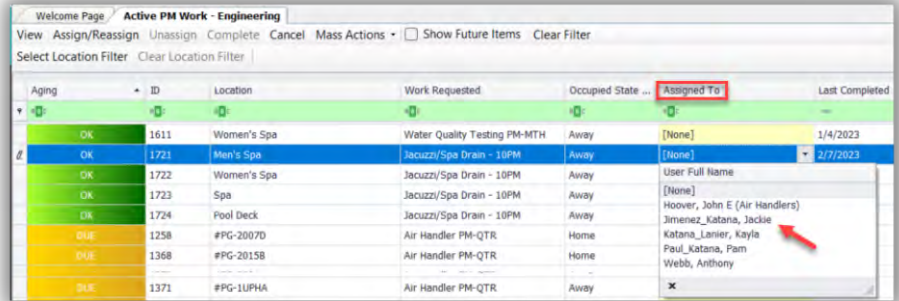




PMs can be assigned one-at-a-time or you can select multiple PMs to assign to one team member. Remember, PMs can only be assigned to one person. The process for tracking additional team members' work on the same PM is an internal leadership decision.

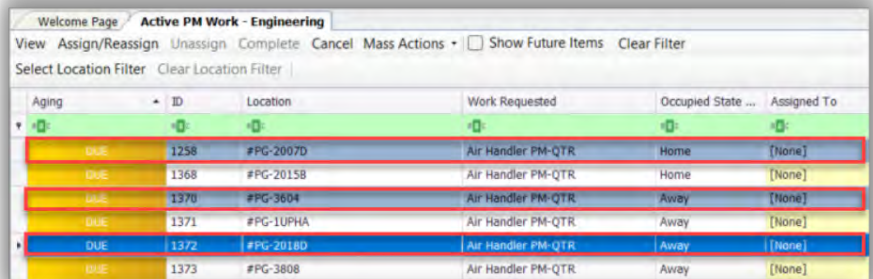
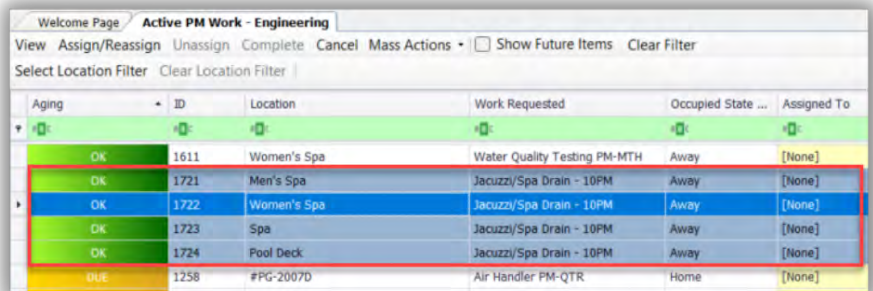
Step 1: To assign an Individual PM,
Highlight the PM and use the
Assign To drop-down to select the user.



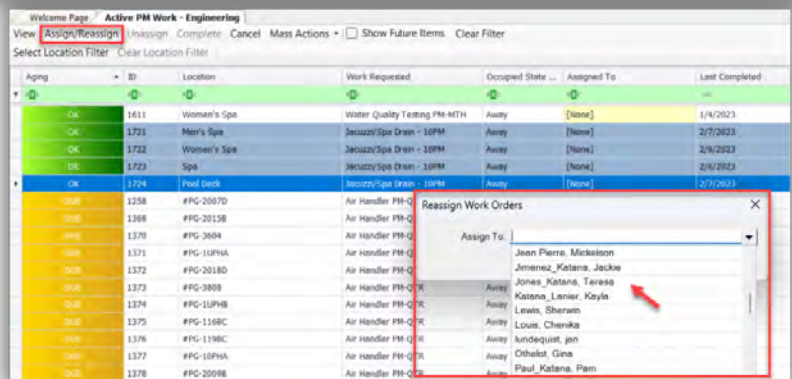
Step 2: To assign Multiple PMs to
one person, click and drag your
mouse to *Highlight* the PMs.

or

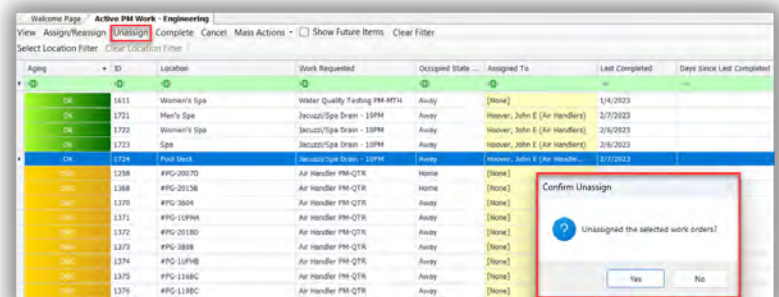
Cherry-pick the PMs by holding
down the CTRL key and clicking on
each PM.



Click **Assign/Reassign** button in the
upper left-hand corner and choose
the preferred team member.



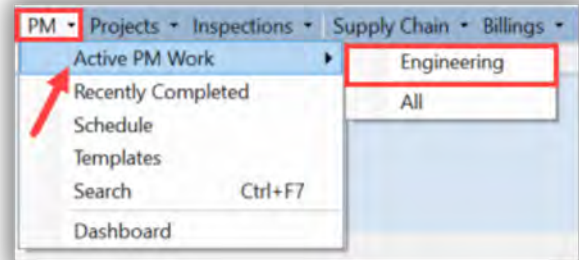
Step 3: To Unassign, follow the same steps to
select the PMs and click the **Unassign** button
in the upper left-hand corner.





Step 1: Save your photo or document on your computer for easy retrieval

Step 2: Open the Active PM work drop down from the PM menu tab. Select a **Department**.



Step 3: Highlight the PM you want to add a photo to and click **View**

Welcome Page Active PM Work								
View	Assign/Reassign	Unassign	Complete	Cancel	Mass Actions	☐ Show Future Items	Clear Filter	View Matrix Print Refresh Reports
Select Location Filter Clear Location Filter								
Aging	ID	Location	Work Requested	Assigned To	Last Completed	Days Since Last Completed	Start At	Department
OK	2999	#PG-31601	Air Handler PM-QTR	[None]	3/22/2023	34	Sat 4/8 0:00	Engineering
OK	3000	#PG-1009A	Air Handler PM-QTR	[None]	1/27/2023	88	Sat 4/8 0:00	Engineering
OK	3001	#PG-3407	Air Handler PM-QTR	[None]	3/22/2023	34	Sat 4/8 0:00	Engineering
OK	3002	#PG-31605	Air Handler PM-QTR	[None]	3/22/2023	35	Sat 4/8 0:00	Engineering

Step 4: When the Details screen opens, click the **Comments** tab above the task list

Tasks (0/18) Costs Comments (0) Journal Entries Log Notifications		
Edit	Delete	Move Up Move Down Select All Deselect All
#	Completed	Name
1	☐	Inspect General Condition
2	☐	Check Electrical Connections
3	☐	Check Coil Fins Straighten If Needed

Step 5: Click **New Comment**

Tasks (0/18) Costs Comments (0) Journal Entries Log Notifications		
New Comment	Edit	Delete
Date	Comment	By

Step 6: Click **Browse** to select the photo from your desktop. A comment must be added. Click **OK**. You can add as many photos as needed.



Only jpg files can be uploaded.

New Comment

Coil fins cleaned

Picture: C:\Users\Kayla Ross\Pictures\coil fin.jpg

Browse

OK Cancel

Step 7: Success! You have entered a photo to your PM

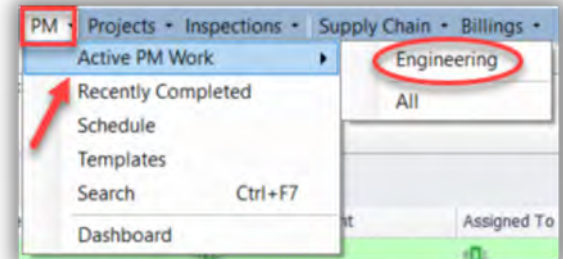
Tasks (0/18) Costs Comments (1) Journal Entries Log Notifications			
New Comment	Edit	Delete	
Date	Comment	By	Picture
4/26/2023 9:22 AM	Coil fins cleaned	Lanier, Kayla	No image data



Photos and comments are date and time stamped for recording and tracking purposes



Step 1: Open the Active PM work drop down from the PM menu tab. Select a **Department**.



Step 2: Highlight the PM work order that you would like to complete from the Active PM list. Click the drop-down arrow in the **Assigned To** column and select an assignee from the list.

Welcome Page / Active PM Work - Engineering							
View Assign/Reassign Unassign Complete Cancel Mass Actions Show Future Items Clear Filter							
Select Location Filter Clear Location Filter							
Aging	ID	Location	Work Requested	Facilities Department	Assigned To	Last Completed	
OK	3450	Spa	Pool & Spa Readings PM-AM Daily	KW Training Site	[None]	3/30/2023	
OK	3451	Pool Deck	Pool & Spa Readings PM-AM Daily	KW Training Site	[None]	3/30/2023	
OK	3462	Spa	Jacuzzi/Spa Drain - 10PM	KW Training Site	User Full Name		
OK	3463	Women's Spa	Jacuzzi/Spa Drain - 10PM	KW Training Site	[None]		
OK	3464	Men's Spa	Jacuzzi/Spa Drain - 10PM	KW Training Site	Freeman, Steve		
OK	3465	Pool Deck	Jacuzzi/Spa Drain - 10PM	KW Training Site	Jones_Katana, Teresa		
OK	2999	#PG-31601	Air Handler PM-QTR	KW Training Site	Katana_Lanier, Kayla		
OK	3000	#PG-1009A	Air Handler PM-QTR	KW Training Site	Perez_Katana, Gabi		
OK	3001	#PG-3407	Air Handler PM-QTR	KW Training Site	Webb, Anthony		

Step 3: Click the **Complete** button on top of the menu bar.

Welcome Page / Active PM Work - Engineering							
View Assign/Reassign Unassign Complete Cancel Mass Actions Show Future Items Clear Filter							
Select Location Filter Clear Location Filter							
Aging	ID	Location	Work Requested	Facilities Department	Assigned To	Last Completed	
OK	3450	Spa	Pool & Spa Readings PM-AM Daily	KW Training Site	[None]		
OK	3451	Pool Deck	Pool & Spa Readings PM-AM Daily	KW Training Site	Webb, Anthony		
OK	3462	Spa	Jacuzzi/Spa Drain - 10PM	KW Training Site	[None]		

Step 4: The Complete Work Order dialogue box will open. Click the radial button for **Duration**, enter the start and stop time, and click **OK**. **All Tasks will automatically complete.**

Complete Work Order

Actual Start and Completion:

Started: ☐ Calculate 4/13/2023 at 1:29 PM

Duration ☒ Calculate Days: 0 Hours: 0 Minutes: 0

Completed: ☐ Calculate 4/13/2023 at 1:29 PM

☐ This work order is being backdated (set Expected Start to Actual Start)

Comment:

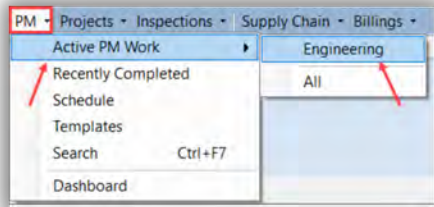
OK Cancel



Completed PMs can be viewed from the Recently Completed PM Work Screen up to the last 7 days.



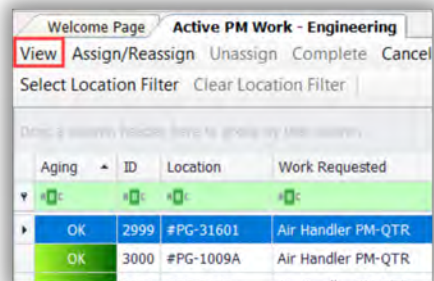
Step 1: Open the **Active PM Work** drop-down from the **PM** menu tab. Select a Department.



Step 2: Highlight the PM work order you would like to complete from the **Active PM** list. Click the drop-down arrow in the **Assigned To** column and select an assignee from the list.

Aging	ID	Location	Work Requested	Assigned To	Last Completed	Days Since Last
OK	2999	#PG-31601	Air Handler PM-QTR	[None]	3/22/2023	
OK	3000	#PG-1009A	Air Handler PM-QTR	User Full Name		
OK	3001	#PG-3407	Air Handler PM-QTR	[None]		
OK	3002	#PG-31605	Air Handler PM-QTR	Freeman, Steve		
OK	3003	#PG-31005	Air Handler PM-QTR	Jones_Katana, Teresa		
OK	3004	#PG-1011D	Air Handler PM-QTR	Katana_Lanier, Kayla		
OK	3005	#PG-32203	Air Handler PM-QTR	Perez_Katana, Gabi		
OK	3006	#PG-2012D	Air Handler PM-QTR	Webb, Anthony		

Step 3: Click **View** in the upper lefthand corner of the menu bar



Step 4: The Task list is found on the bottom half of the work order details screen. To update all the tasks at once, click **Select All**, next go two buttons to the right and click **Change Selected Tasks to** and Select **Complete**

#	Δ	Completed	Name
1	☐		Inspect General Condition
2	☐		Check Electrical Connections
3	☐		Check Coil Fins Straighten If Needed
4	☐		Check Fan/Clean If Needed
5	☐		Check Operation Of Chilled Water and Hot Water Valve
6	☐		Check Condensate Pan & Drain; Add Algaecide

Step 5: Uncheck any Incomplete tasks in the **Completed** column.



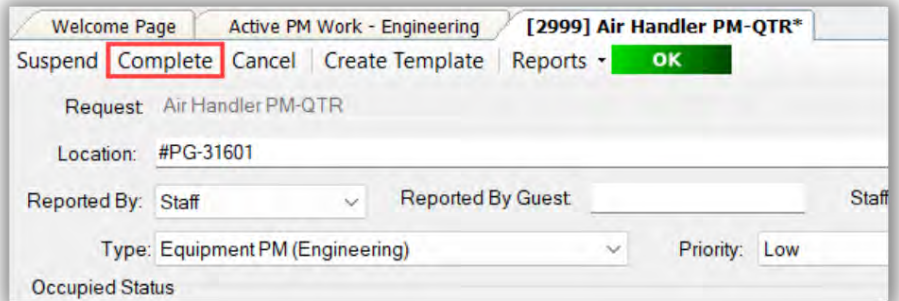
To change the status of multiple tasks, press and hold the **Shift** key to select sequential tasks or the **Control** key to select random tasks.

#	Δ	Completed	Name
4	☒		Check Fan/Clean If Needed
5	☒		Check Operation Of Chilled Water and Hot Water Valve
6	☒		Check Condensate Pan & Drain; Add Algaecide
7	☒		Check All Doors and Hardware/Emergency Lock Release
8	☐		Check Fan Motor(s)
9	☒		Oil Motor Per Manufacture
10	☒		Check Condition Of Blades

Step 6: If applicable, add Notes to the associated Task(s). Simply click on the note field to add or edit a Note(s)

#	Δ	Completed	Name	Category	Summary	Notes	Extra Request?
4	☒		Check Fan/Clean If Needed				☐
5	☒		Check Operation Of Chilled Water and Hot Water Valve				☐
6	☒		Check Condensate Pan & Drain; Add Algaecide				☐
7	☒		Check All Doors and Hardware/Emergency Lock Release				☐
8	☐		Check Fan Motor(s)			Needs to be replaced, not working	☐
9	☒		Oil Motor Per Manufacture				☐
10	☒		Check Condition Of Blades				☐
11	☒		Check Load Amps On Fan				☐
12	☒		Clean Coil If Needed				☐

Step 7: Click the **Complete** button on top of the menu bar.

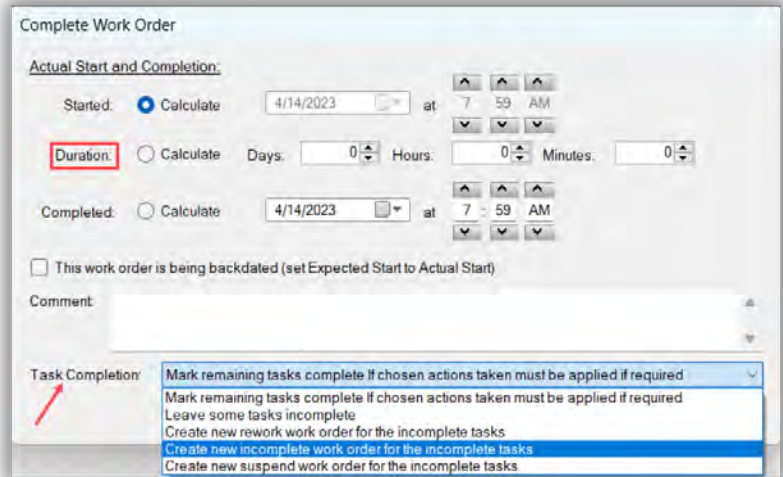


The screenshot shows a software window titled 'Active PM Work - Engineering'. At the top, there is a menu bar with 'Welcome Page', 'Active PM Work - Engineering', and '[2999] Air Handler PM-QTR*'. Below the menu bar, there are buttons: 'Suspend', 'Complete' (highlighted with a red box), 'Cancel', 'Create Template', 'Reports', and a green 'OK' button. The form contains the following fields: 'Request: Air Handler PM-QTR', 'Location: #PG-31601', 'Reported By: Staff' (with a dropdown arrow), 'Reported By Guest: ' (with a text input field), 'Type: Equipment PM (Engineering)' (with a dropdown arrow), 'Priority: Low', and 'Occupied Status'.

Step 8: The Complete Work Order dialogue box will open. Enter the work time. Next select a **Task Completion** option and click **OK**. If you need to track and complete the incomplete work later Select “Create new rework work order for the incomplete tasks”.

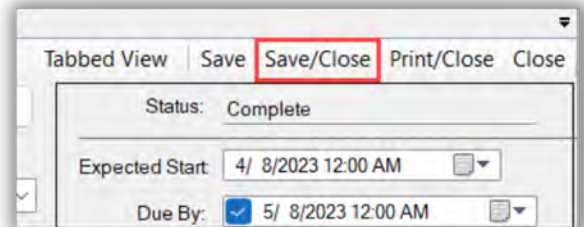


Completed PM's can be viewed from the Recently Completed PM Work Screen up to the last 7 days



The screenshot shows the 'Complete Work Order' dialogue box. It has a title bar 'Complete Work Order'. Inside, there is a section 'Actual Start and Completion:' with 'Started:' set to 'Calculate' and a date/time of '4/14/2023 at 7:59 AM'. Below this is a 'Duration:' field (highlighted with a red box) and 'Completed:' set to 'Calculate' with a date/time of '4/14/2023 at 7:59 AM'. There is a checkbox 'This work order is being backdated (set Expected Start to Actual Start)'. A 'Comment:' text area is present. At the bottom, there is a 'Task Completion:' dropdown menu (highlighted with a red arrow) showing a list of options: 'Mark remaining tasks complete if chosen actions taken must be applied if required', 'Mark remaining tasks complete if chosen actions taken must be applied if required', 'Leave some tasks incomplete', 'Create new rework work order for the incomplete tasks', 'Create new incomplete work order for the incomplete tasks', and 'Create new suspend work order for the incomplete tasks'.

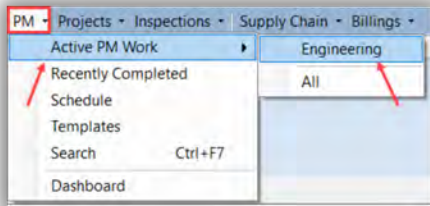
Step 9: Click **Save/Close** in the upper right-hand corner.



The screenshot shows a software window with a menu bar containing 'Tabbed View', 'Save', 'Save/Close' (highlighted with a red box), 'Print/Close', and 'Close'. Below the menu bar, there is a 'Status:' field set to 'Complete'. There is an 'Expected Start:' field set to '4/ 8/2023 12:00 AM' and a 'Due By:' field set to '5/ 8/2023 12:00 AM'.



Step 1: Open the **Active PM Work** drop-down from the **PM** menu tab. Select a Department.



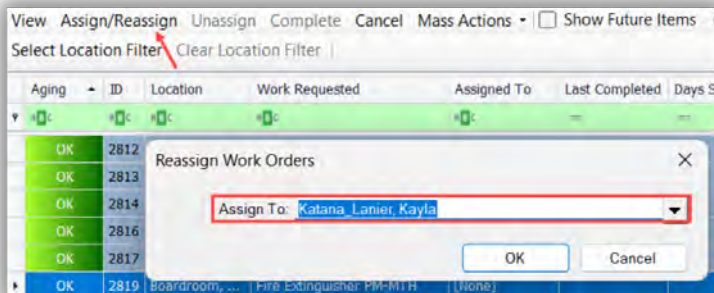
Step 2: Select the group of work orders that you want to Mass-Complete.

Aging	ID	Location	Work Requested	Assigned To	Last Completed	Days Since Last Completed	Occu
OK	2812	Tower 3, Ro...	Fire Extinguisher PM-MTH	[None]	3/16/2023	28	Away
OK	2813	Tower 2, Val...	Fire Extinguisher PM-MTH	[None]	3/28/2023	16	Away
OK	2814	Tower 3, Ro...	Fire Extinguisher PM-MTH	[None]	3/14/2023	30	Away
OK	2816	Bike Room, A...	Fire Extinguisher PM-MTH	[None]	3/22/2023	23	Away
OK	2817	Tower 2, Dw...	Fire Extinguisher PM-MTH	[None]	3/29/2023	15	Away
OK	2819	Boardroom, ...	Fire Extinguisher PM-MTH	[None]			Away
OK	2821	Amenities, FI ...	Fire Extinguisher PM-MTH	[None]	3/28/2023	16	Away



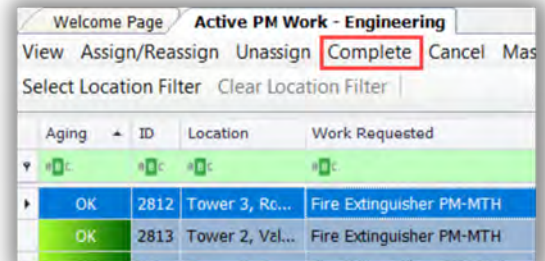
Press and hold the **Shift** key to select sequential work orders, or the **Control** key to select random work orders.

Step 3: To Assign a team member to the **highlighted PMs** for completion, click **Assign/Reassign**. Select an assignee and click **OK**



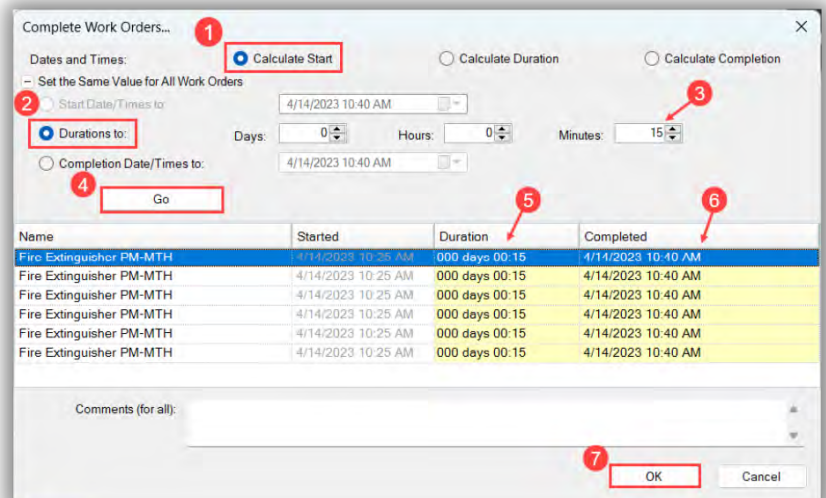
When mass completing PMs all PMs must be assigned to the same person and completed on the same day.

Step 4: Click **Complete** on the main toolbar.



Step 5: Tracking work time:

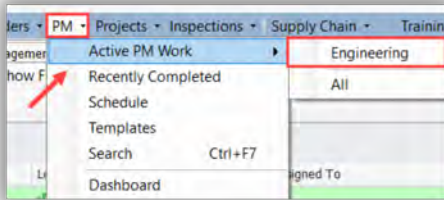
- (1) Select **Calculation Start** radial button
- (2) Click the **Duration to** radial button
- (3) Enter the duration time or estimate
- (4) Click **Go** and
- (5 - 6) All times will be updated in the yellow fields
- (7) Select **OK**.



Completed PMs can be viewed from the **Recently Completed PM Work** Screen up to the last 7 days



Step 1: Open the Active PM Work drop-down from the PM menu tab. Select a Department.



Step 2: The Active PM screen contains all of the active PMs that have been generated for your site by the system at the beginning of the period in which they should be completed.

- The bottom left-hand corner gives you the total PMs.
- The different columns provide information at a glance that will help you manage your PM work.
- Use the green filter bar to narrow the data for a column (for example filter for all Air Handler PM work that needs to be completed).

Step 3: The two most important columns provide you with critical information that enables you to decide the best course of action when prioritizing and assigning your PM work.

- **Last Completed** column gives you the date that the PM work order was last completed at that location.
- **Days Since Last Completed** column is the actual number of days since the work was completed at that location.

Location	Work Requested	Assigned ...	Occupied State ...	Last Completed	Days Since Last Completed
☐ Air Handler PM-QTR	☐ Air h	☐	☐	=	=
Tower 1, Roofto...	Air Handler PM-QTR	[None]	Not Occupied	6/10/2022	241
Tower 3	Air Handler PM-QTR	[None]	Not Occupied	8/11/2022	179
Fuel Storage Room	Air Handler PM-QTR	[None]	Not Occupied	8/11/2022	179
Tower 2	Air Handler PM-QTR	[None]	Not Occupied	8/11/2022	179
#PG-31701	Air Handler PM-QTR	[None]	Not Occupied	9/15/2022	144
#PG-3601	Air Handler PM-QTR	[None]	Waiting	10/4/2022	125
#PG-2020C	Air Handler PM-QTR	[None]	Not Occupied	10/4/2022	125
#PG-3508	Air Handler PM-QTR	[None]	Not Occupied	10/12/2022	117

Step 4: Clicking on **Days Since Last Completed** sorts the PMs up and down numerically, listing the location with the longest time since it was last completed.

Last Completed	Days Since Last Completed
=	=
6/10/2022	241
8/11/2022	179
8/11/2022	179
8/11/2022	179
9/15/2022	144
10/4/2022	125
10/4/2022	125
10/12/2022	117

Step 5: Clicking on the **Location** column groups the locations together allowing you to consolidate the work and assign several PMs to be completed by the same technician.

Location	Work Requested
☐	=
Women's Spa	Jacuzzi/Spa Drain - 10PM
Women's Spa	Water Quality Testing PM-MTH
Tower 3	Air Handler PM-QTR
Tower 2	Air Handler PM-QTR
Tower 1, Rooftop, Cooling Tower (C...	Air Handler PM-QTR
Spa	Jacuzzi/Spa Drain - 10PM



Step 1: Highlight the PM you are interested in and click **View Matrix** in the upper right-hand corner of the screen.

Welcome Page | **Active PM Work**

View Assign/Reassign Unassign Complete Cancel Mass Actions ☐ Show Future Items Clear Filter View Matrix Print Refresh

Select Location Filter Clear Location Filter

Aging	Location	Work Requested	Assigned To	Occupied State	Last Completed	Days Since Last Completed	Start At	Department	Type
OK	Men's Spa	Jacuzzi/Spa Drain - 10PM	Webb, Anthony	Away	2/7/2023		0 Tue 2/7 0:00	Engineering	Equipment PM
DUE	#PG-31701	Air Handler PM-QTR	[None]	Away			Sun 1/8 0:00	Engineering	Equipment PM
DUE	#PG-3601	Air Handler PM-QTR	[None]	Away			Sun 1/8 0:00	Engineering	Equipment PM
DUE	#PG-2020C	Air Handler PM-QTR	[None]	Away			Sun 1/8 0:00	Engineering	Equipment PM
DUE	#PG-3508	Air Handler PM-QTR	[None]	Away			Sun 1/8 0:00	Engineering	Equipment PM
DUE	#PG-3607	Air Handler PM-QTR	[None]	Away			Sun 1/8 0:00	Engineering	Equipment PM

Step 2: The Matrix shows a complete status view of the highlighted PM for all locations. Check the **Show Last Completion Date** box to see the last date the PM was completed at each location.

Welcome Page | **Active PM Work** | **PM Matrix - Air Handler PM-QTR**

☒ Show Last Completion Date ☐ Show Inactive (Double-click red and yellow items to view the Filter by Occupied Status) Print Refresh Close

#PG-3804 Away This item has never been completed	#PG-3805 Away This item has never been completed	#PG-3806 Away This item has never been completed	#PG-3808 Away This item has never been completed
#PG-3906 Away This item has never been completed	#PG-3908 Away This item has never been completed	#PG-3PH02 Away Last completed on 2/6/2023	#PG-3PH03 Away Last completed on 2/6/2023
Amenities Away Last completed on 1/4/2023	Boardroom Away Last completed on 1/4/2023	Breakroom Away Last completed on 1/25/2023	Dining Room Away Last completed on 1/6/2023
Fire Control Room Away Last completed on 2/1/2023	Fuel Storage Room Away Last completed on 2/1/2023	Generator Room Away Last completed on 1/5/2023	Lobby / Back of House Away Last completed on 12/16/2022
Tower 1 Away Last completed on 2/6/2023	Tower 1, Rooftop, Cooling Tower (CT-11-1) USS-212-528 Away Last completed on 12/30/2022	Tower 2 Away Last completed on 12/16/2022	Tower 3 Away Last completed on 1/3/2023
Women's Spa Away Last completed on 1/5/2023			

293 Items 84 (28.67%) Complete (Green) 0 (0.00%) Superseded (Blue) 209 (71.33%) Incomplete (Yellow and Red) 0 (0.00%) Unsuccessful and Not Planned (Orange)

kross: KW Training Site Last Action: WorkOrder #111328, Named "New Property Assessment - Boiler Room" Saved

Step 3: The colors give you additional information. The **Color Key** and percentage of the completion rate are at the bottom of the page.

Welcome Page | **Active PM Work** | **PM Matrix - Air Handler PM-QTR**

☒ Show Last Completion Date ☐ Show Inactive (Double-click red and yellow items to view the Filter by Occupied Status) Print Refresh Close

#PG-3804 Away This item has never been completed	#PG-3805 Away This item has never been completed	#PG-3806 Away This item has never been completed	#PG-3808 Away This item has never been completed
#PG-3906 Away This item has never been completed	#PG-3908 Away This item has never been completed	#PG-3PH02 Away Last completed on 2/6/2023	#PG-3PH03 Away Last completed on 2/6/2023
Amenities Away Last completed on 1/4/2023	Boardroom Away Last completed on 1/4/2023	Breakroom Away Last completed on 1/25/2023	Dining Room Away Last completed on 1/6/2023
Fire Control Room Away Last completed on 2/1/2023	Fuel Storage Room Away Last completed on 2/1/2023	Generator Room Away Last completed on 1/5/2023	Lobby / Back of House Away Last completed on 12/16/2022
Tower 1 Away Last completed on 2/6/2023	Tower 1, Rooftop, Cooling Tower (CT-11-1) USS-212-528 Away Last completed on 12/30/2022	Tower 2 Away Last completed on 12/16/2022	Tower 3 Away Last completed on 1/3/2023
Women's Spa Away Last completed on 1/5/2023			

293 Items 84 (28.67%) Complete (Green) 0 (0.00%) Superseded (Blue) 209 (71.33%) Incomplete (Yellow and Red) 0 (0.00%) Unsuccessful and Not Planned (Orange)

kross: KW Training Site Last Action: WorkOrder #111328, Named "New Property Assessment - Boiler Room" Saved

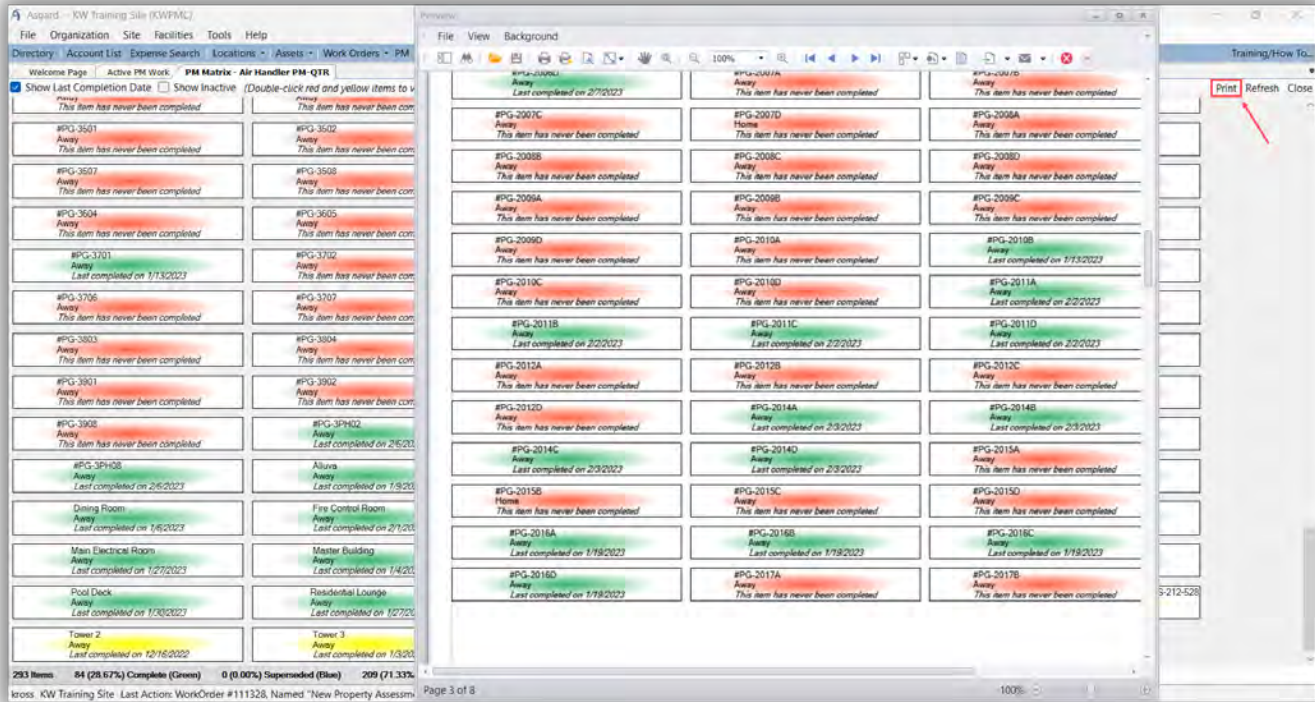
GREEN – PM completed this period (QTR/ANN/MTH etc.).

YELLOW – PM completed last period but has not yet been completed this period

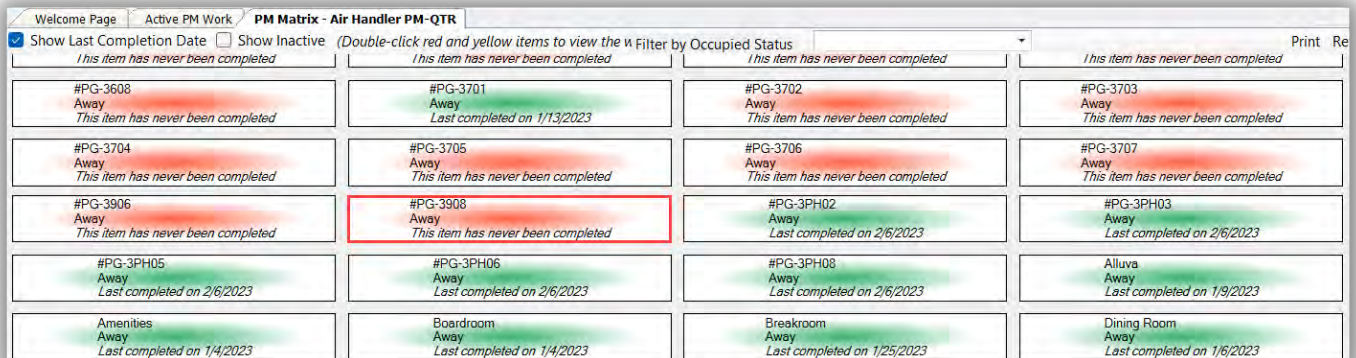
RED – PM not completed for at least the last two periods

ORANGE – Indicates a location is out of service or unavailable

Step 4: To print the Matrix, click the Print button in the right-hand corner.



Step 5: You can view and assign incomplete PMs from the Matrix. Double click on a yellow or red location to open the PM.



Use the Assignee field on the right-hand side of the screen to assign the PM.

