Computerized Maintenance Management System e-Lex CMMS

User's Manual

۵ (2] COMPUTERIZED MAIN	TENANCE MANAGEMENT SYS	ГЕМ	- • ×
Set Up Frequency Period Work	Order <u>R</u> eports	ols <u>H</u> elp		
Vendor Inventory Equipar	nent Work Order	Pu <u>r</u> chase Order <u>B</u> ack-	Up E <u>x</u> it	
Set Up				
Equipment Type/Category	Frequency <u>P</u> eriod			
Main Location Setup	Work Order Period			
Department Setup				
Miscellaneou's Statup 🔗 🔗	Work Priority	Wor <u>k</u> Order		
Standard PM/CM Task Library 🥊	₩ork <u>S</u> tatus	Work Order List		
Personnel/Assignee Setup	Mork Type	Senerate PM Work	Order	
Company/Registration Setup	Work Trade	Generate Monthly P	M Work Order	
CMMS Reports Setup	Equipment Status	Work Order Remin	der	
🔒 User's Menu Profiles	Marranty/Contract			
<u>M</u> enu Profiles	<u>C</u>ritically			

Figure 1: Main Page

Q1. How to create a Preventive Maintenance?

- 1. Using Figure 1. in the pulldown menu Setup all the modules with a light green background must have an inputted data.
- 2. In the toolbar Equipment click Equipment. See Figure 2.1.

2		[EQUIPMENT	SETUP] No	umber of	records :	4/191			×
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	MENT_ID	Work Orders History				Filter By Location:	SDA		•
2-1 Equipment Information Equipment Id: 1 Main Location: S	2-2 DF-15T-STAC-20	15TR Split-Type ACU SDA CAMPUS SDA BUILDING			upplier Vendor : (ct Person: (use Price : (0.00 C	urrent Valu	e : [0.00
	DF Rm#: DA-10F-GREEN OOM	GREEN ROOM			Acquire : [)isposed : [_!_! & _!_! &			
Department:	🔊	[Manufactu Mar	urer hufacturer: [
Status: 0	005 X)	Aircon For Repair		(Model #: [Capacity : [0.00	Serial #:		
Requested By: Current Meter: Notes:	0.00	Current Miles:	0.00		ct Person: [Warranty: [te Expire : [Others: [)		

Figure 2-1 : Equipment Information

2.1. In Figure 2-1 you need to input the information of equipment

			[3	QUIPMENT	SETUP] Number o	pr records :	4/191			
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			Split-Type ACU						1106	
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Search By:	EQUIPME	NT ID	+				Filter By Location:	SDA		
uipment <u>I</u> n Freg PM	Deried :	2-2	<u>W</u> ork Orders] 🖌]				10F-1	5T-STAC-2
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Figure 2.2 : Equipment PM Tasks

In Figure 2-2 you need to create a PM Tasks Entries for every equipment. In label Freq PM Period in the combo box please select a Frequency Period. Creating, Editting, and Deleting PM Task just click the button with a default icon for each button. Clicking add or edit will bring you to the next screen below. Figure 2.2.1.

🕘 [w.c	D. TASK FORM NO.] : 10E-1.5T-013 - AKIC-13-00003	×
Save Ca	a ncel	add
Task Sequence: 0 Description: 1	2 (1)	
Description.		
Remark:		
Estimated Labor Hr:	0.00	

Figure 2.2.1. Preventive Maintenance Work Order Library

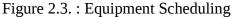
There is also a button to copy all the PM Task you created from one equipment to one or more equipment provided they are similar in type. Just click the button Copy PM and it will bring you to the screen below. Figure 2.2.2. Note if you plan to change the PM Task for one of the equipment you can update all the equipment with similar type by same procedure as you did before in the Copy PM button.

PERIOD EQUIPMENT ID EQUIPMENT NAME LOCATION Monthiy 02F-0.5H-EF-025 0.5hp Exhaust Fan SDA-2F-Car Park Refresh Monthiy 10F-10H-AHU-10A 10hp Air Handling Unit SDA-10F-X AREA Monthiy 10F-15H-AHU-10B 15hp Air Handling Unit SDA-10F-X AREA Monthiy 11F-15H-AHU-10B 15hp Air Handling Unit SDA-10F-X AREA Monthiy 11F-15H-AHU-10B 15hp Air Handling Unit SDA-11F-X AREA Monthiy 11F-15F-STAC-22 15TR Split-Type ACU Store > Monthiy 12F-5H-KSF-001 5HP Exhaust Fan Store > Monthiy 12F-7.5H-AHU-12A 7.5hp Air Handling Unit SDA-12F-X3 AREA Monthiy 12F-7.5H-AHU-12A 7.5hp Air Handling Unit SDA-12F-X3 AREA Monthiy 12F-7.5H-AHU-12A 7.5hp Air Handling Unit SDA-14F-Y AREA Monthiy 14F-10H-AHU-14L 10hp Air Handling Unit SDA-14F-Y AREA Monthiy 14F-3T-STAC-24 3TR Split-Type ACU SDA-14F-Y AREA Monthiy 14F-3T-STAC-24 3TR Split-Type ACU SDA-14F-Y AREA Monthiy 14F-3T-STAC-26 3TR Split-Type			LIST OF EQUIP	MENTS TO	BE SELECTED			Selection	List of selected Equipment(s)
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Monthly 14F-10H-AHU-14A 10hp Air Handling Unit SDA-14F-X3 AREA Monthly 14F-10H-AHU-14E 10hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-15H-AHU-14C 15hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-3T-STAC-24 3TR Split-Type ACU SDA-14F-CONFER Monthly 14F-3T-STAC-26 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-7.5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7.5H-AH-14D 7.5hp Air Handling Unit SDA-14F-YAREA Monthly 14F-7.5H-AH-14D 7.5hp Air Handling Unit SDA-14F-YAREA Monthly 14F-7.5H-AH-14D 7.5hp Air Handling Unit SDA-14F-YAREA Monthly 14F-7.5H-AH-14B 7.5hp Air Handling Unit SDA-14F-YAREA Monthly 14F-7.5H-AH-14B 7.5hp Air Handling Unit SDA-14F-YAREA Monthly 2F-0.5H-EF-025 0.5hP Exhaust Fan SDA-2F-Car Park ▼ Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park ▼ Field Name/Sort Search Text: E IIII		Monthly	12F-7.5H-AHU-12B	7.5hp Air H	andling Unit	SDA-12F-X3 AREA		<< Remo <u>v</u> e	
Monthly 14F-10H-AHU-14E 10hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-15H-AHU-14C 15hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-15H-AHU-14C 15hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-3T-STAC-24 3TR Split-Type ACU SDA-14F-CONFER Monthly 14F-3T-STAC-25 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-7, SH-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7, SH-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7, SH-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7, SH-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7, SH-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7, SH-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 2F-0.5H-EF-025 0.5hP Exhaust Fan SDA-2F-Car Park ▼ Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park ▼ Field Name/Sort Search Text: E III		Monthly	12T-STAC-23	Split-Type A	CU	SDA-12F-PRESIDE			
Monthly 14F-15H-AHU-14C 15hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-3T-STAC-24 3TR Split-Type ACU SDA-14F-CONFER Monthly 14F-3T-STAC-25 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-3T-STAC-26 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-7,5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7,5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7,5H-AH-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7,5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7,5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 2F-0.5H-EF-025 0.5HP Exhaust Fan SDA-2F-Car Park ▼ Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park ▼ Field Name/Sort Search Text: E III		Monthly	14F-10H-AHU-14A	10hp Air Ha	andling Unit	SDA-14F-X3 AREA			
Monthly 14F-15H-AHU-14C 15hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-3T-STAC-24 3TR Split-Type ACU SDA-14F-CONFER Monthly 14F-3T-STAC-25 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-3T-STAC-26 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-7,5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7,5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7,5H-AH-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7,5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7,5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 2F-0.5H-EF-025 0.5HP Exhaust Fan SDA-2F-Car Park ▼ Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park ▼ Field Name/Sort Search Text: E III		Monthly	14F-10H-AHU-14E	10hp Air Ha	andling Unit	SDA-14F-Y AREA		E I	
Monthly 14F-3T-STAC-25 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-3T-STAC-26 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-7.5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7.5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7.5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 2F-0.5H-EF-025 0.5HP Exhaust Fan SDA-14F-X4 AREA Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park Teld Name/Sort Search Text:		Monthly	14F-15H-AHU-14C	15hp Air Ha	andling Unit	SDA-14F-Y AREA		Copy PM	
Monthly 14F-3T-STAC-26 3TR Split-Type ACU SDA-14F-MCAD 5 Monthly 14F-7.5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7.5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 2F-0.5H-EF-025 0.5HP Exhaust Fan SDA-2F-Car Park Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park Held Name/Sort Search Text: EQUIPMENT ID		Monthly	14F-3T-STAC-24	3TR Split-Ty	/pe ACU	SDA-14F-CONFER			
Monthly 14F-7.5H-AH-14D 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7.5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-Y AREA Monthly 14F-7.5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-X 4 AREA Monthly 2F-0.5H-EF-025 0.5HP Exhaust Fan SDA-2F-Car Park Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park Field Name/Sort Search Text: EQUIPMENT ID ♦		Monthly	14F-3T-STAC-25	3TR Split-Ty	/pe ACU	SDA-14F-MCAD S			
Monthly 14F-7.5H-AH-14D / 5.hp Air Handling Unit SDA-14F-1 AREA Monthly 14F-7.5H-AHU-14B 7.5hp Air Handling Unit SDA-14F-X4 AREA Monthly 2F-0.5H-EF-025 0.5HP Exhaust Fan SDA-2F-Car Park ▼ Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park ▼ Till Till Till Till Till Till Till Till		Monthly	14F-3T-STAC-26	3TR Split-Ty	/pe ACU	SDA-14F-MCAD S			
Monthly 2F-0.5H-EF-025 0.5HP Exhaust Fan SDA-2F-Car Park ▼ Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park ▼ HI Field Name/Sort Search Text: EQUIPMENT ID ↓		Monthly	14F-7.5H-AH-14D	7.5hp Air H	andling Unit	SDA-14F-Y AREA			
Monthly 2F-0.5H-EF-026 0.5hp Exhaust Fan SDA-2F-Car Park Field Name/Sort Search Text: EQUIPMENT ID		Monthly	14F-7.5H-AHU-14B	7.5hp Air H	andling Unit	SDA-14F-X4 AREA		Close	
Field Name/Sort Search Text: EQUIPMENT ID Image: Constraint of the second seco		Monthly	2F-0.5H-EF-025	0.5HP Exha	ust Fan				
Field Name/Sort Search Text:		Monthly			ust Fan		•		
EQUIPMENT ID	_					•			▲ III
	Fie	ld Name/Sort			Search Text:				
te: Clicking Copy PM will delete all the previous PM of the selected equipment if already has and Copy all the PM of the reference Equipmer	E	QUIPMENT ID		 \$]					
located in the title Bar to all the selected Equipment in th right. Please click Refresh button if data did not refresh.			•	•			-		

Figure 2.2.2 : Copying PM Task to one or more Equipment

2.3. Equipment Scheduling : Toolbar Button Scheduling is where you make the schedule of every equipment for maintenance. If that equipment has a multiple schedule frequency you need to assign each frequency period for Annual, Semi-Annual, etc.

Edit <u>E</u> dit <u>S</u> ave	Cancel <u>R</u> efresh <u>Print</u>	Close						<u>H</u> elp
EQUIPMENT ID	EQUIPMENT NAME	FREQUENCY	REF. DATE	DAY	LOCATION	SUB-LOC	FLOOR	ROOM
02F-0.5H-EF-025	0.5hp Exhaust Fan	Quarterly	03/05/2013	Tue	SDA	SDA-2F-Car Park	2F	Car Park
10F-10H-AHU-10A	10hp Air Handling Unit	Quarterly	03/10/2013	Sun	SDA	SDA-10F-X AREA	10F	X AREA
10F-15H-AHU-10B	15hp Air Handling Unit	Quarterly	03/10/2013	Sun	SDA	SDA-10F-Y AREA	10F	Y AREA
10F-15H-AHU-10B	15hp Air Handling Unit	Semi-Annual	01/13/2013	Sun	SDA	SDA-10F-Y AREA	10F	Y AREA
10F-15H-AHU-10B	15hp Air Handling Unit	Annual	01/15/2012	Sun	SDA	SDA-10F-Y AREA	10F	Y AREA
10F-15T-STAC-20	15TR Split-Type ACU	Monthly	01/27/2013	Sun	SDA	SDA-10F-GREEN	10F	GREEN R
10F-15T-STAC-20	15TR Split-Type ACU	Quarterly	02/17/2013	Sun	SDA	SDA-10F-GREEN	10F	GREEN R
11F-15H-AHU-11A	15TR Air Handling Unit	Quarterly	03/10/2013	Sun	SDA	SDA-11F-X AREA	11F	X AREA
11F-15T-STAC-21	15TR Split-Type ACU	Monthly	01/27/2013	Sun	SDA		11	1106
11F-15T-STAC-21	15TR Split-Type ACU	Quarterly	02/17/2013	Sun	SDA		11	1106
11F-15T-STAC-22	15TR Split-Type ACU	Monthly	01/27/2013	Sun	SDA		11	1106
11F-15T-STAC-22	15TR Split-Type ACU	Quarterly	02/17/2013	Sun	SDA		11	1106
11F-20H-AHU-11B	20hp Air Handling Unit	Quarterly	03/10/2013	Sun	SDA	SDA-11F-Y AREA	11F	Y AREA
12F-5H-KEF-001	5HP Exhaust Fan	Quarterly			SDA		12F	Cafeteria
12F-5H-KSF-001	5HP Supply Fan	Quarterly			SDA		12F	Cafeteria
12F-7.5H-AHU-12A	7.5hp Air Handling Unit	Quarterly	03/10/2013	Sun	SDA	SDA-12F-X3 AREA	12F	X3 AREA
12F-7.5H-AHU-12B	7.5hp Air Handling Unit	Quarterly	03/10/2013	Sun	SDA	SDA-12F-X3 AREA	12F	X3 AREA
12T-STAC-23	Split-Type ACU	Monthly	01/27/2013	Sun	SDA	SDA-12F-PRESID	12F	PRESIDE
12	Split-Type ACU	Quarterly	02/17/2013	Sun	SDA	SDA-12F-PRESID	12F	PRESIDE
14F-10H-AHU-14A	10hp Air Handling Unit	Quarterly	03/03/2013	Sun	SDA	SDA-14F-X3 AREA	14F	X3 AREA
14F-10H-AHU-14E	10hp Air Handling Unit	Quarterly	03/03/2013	Sun	SDA	SDA-14F-Y AREA	14F	Y AREA
14F-15H-AHU-14C	15hp Air Handling Unit	Quarterly	03/03/2013	Sun	SDA	SDA-14F-Y AREA	14F	Y AREA
								Þ
Search By: EQUIF	PMENT_ID 😫			Filter By Lo	cation/Frequer	sDA \$	All	
uipment Information								
· ·	F-7.5H-AHU-1: 7.5hp Air Har	ndling Unit	Period :	Quarterly	Refere	nce Date : 03/10/2	013	🗶 Sun
Main Location: SD	A	Sub Location:	DA-12F-X3 A	REA		Flr#: 12F	Rm#: X3	AREA
Department: En	gineering	Equip Type: A	ircon		s	Status: active		



2.3.1. Making a schedule for a specific equipment, select first the location in the label Filter By Location/Frequency by clicking the combo box and also select the Frequency by clicking the combo box next to the location. The select/highlight the specific equipment and click *Edit* button. In the reference date input a schedule for this equipment. Note that this reference date is the Estimated schedule of this equipment after it is processed in the Generate Monthly PM Work Order. Also the estimated schedule is not base on the specific number of date but base on the days it fall for the month. Example you make a schedule 03/03/2013. This is the first Sunday of March 2013. So if processed for April Monthly W.O. Schedule it will fall on 04/07/2013 which is also the first Sunday of April.

Reports of the Equipment Schedule for all the frequency can be viewed by clicking Print in Figure 2.3. above. The Reports will look like below. Figure 2.3.1.

Work Order Report



PROPERTY SPECIALISTS TEAM (PROSPECT), INC.

EQUIPMENT SCHEDULING As of

(

Rundate: 03/20/2013 Time: 02:10:33 AM Usr: 1

EQUIPMENT ID/TAG	EQUIPMENT NAME	BUILDING	DAILY	WEEKLY	MONTHLY	QUARTERLY	SEMI-ANNUAL	ANNUAL
1.02F-0.5H-EF-025	0.5hp Exhaust Fan	SDA				03/05/13 Tue		
2.10F-10H-AHU-10A	10hp Air Handling Unit					03/10/13 Sun		
3.10F-15H-AHU-10B	15hp Air Handling Unit					03/10/13 Sun	01/13/13 Sun	01/15/12 Sun
4.10F-15T-STAC-20	15TR Split-Type ACU	SDA			01/27/13 Sun	02/17/13 Sun		
5.11F-15H-AHU-11A	15TR Air Handling Unit	SDA				03/10/13 Sun		
6.11F-15T-STAC-21	15TR Split-Type ACU	SDA		1	01/27/13 Sun	02/17/13 Sun		1
7.11F-15T-STAC-22	15TR Split-Type ACU	SDA			01/27/13 Sun	02/17/13 Sun		
8.11F-20H-AHU-11B	20hp Air Handling Unit					03/10/13 Sun		
9.12F-5H-KEF-001	5HP Exhaust Fan	SDA		1				1
10. 12F-5H-KSF-001	5HP Supply Fan	SDA						
11. 12F-7.5H-AHU-12A	7.5hp Air Handling Unit					03/10/13 Sun		
12. 12F-7.5H-AHU-12B	7.5hp Air Handling Unit					03/10/13 Sun		
13. 12T-STAC-23	Split-Type ACU	SDA			01/27/13 Sun	02/17/13 Sun		
14. 14F-10H-AHU-14A	10hp Air Handling Unit			1		03/03/13 Sun		1
15. 14F-10H-AHU-14E	10hp Air Handling Unit	SDA				03/03/13 Sun		
16. 14F-15H-AHU-14C	15hp Air Handling Unit					03/03/13 Sun		
17. 14F-3T-STAC-24	3TR Split-Type ACU	SDA			01/27/13 Sun	02/17/13 Sun	· · · · · · · · · · · · · · · · · · ·	
18. 14F-3T-STAC-25	3TR Split-Type ACU	SDA			01/27/13 Sun	02/17/13 Sun		
19. 14F-3T-STAC-26	3TR Split-Type ACU	SDA			01/27/13 Sun	02/17/13 Sun		
20. 14F-5H-BOOST-01	5HP Booster Pump	SDA						01/08/12 Sur
21. 14F-5H-BOOST-02	5HP Booster Pump	SDA						
22. 14F-7.5H-AH-14D	7.5hp Air Handling Unit	SDA				03/03/13 Sun		
23. 14F-7.5H-AHU-14B	7.5hp Air Handling Unit				¢	03/03/13 Sun		

Figure 2.3.1 : Complete Schedule of the Equipment for every Frequency Period

3. Work Order Frequency Period. Please create a Period for the Monthly Work Order Schedule. See Figure 3. below. After creating a Period we are now reading to Generate a Monthly PM Work Order.

		[FREC	QUENCY/	PERIOD S	ETUP] N	o of rec	ords : 0/	2		
- ₽ Add	20 <u>E</u> dit	★ Belete Save	<u>C</u> ance	<u>R</u> efi	resh	X C <u>l</u> ose				
FROM	M DATE	FROM DATE	DAILY	WEEKLY	MONTHLY	QTRLY	SEMI-AN	ANNUAL	DATE ADDED	ADDED BY
01/01/2		01/31/2013	0				0	0	03/15/2013	1
02/01/2	013	02/28/2013	0	0	0	0	0	0	03/16/2013	1
	X								[

1 of 4

- 4. Generate a Monthly PM Work Order Schedule. In the pulldown menu Work Order -> Generate Monthly PM Work Order click this. Steps.
 - 4.1. Select location. Usually if you are a super user you can view all the location but if you are assigned to a specific location you can only process for that assigned location.
 - 4.2. Work Order No. The computer automatically will get the last Work Order No. The generated work order will add 1 to the Work Order here no need to change.
 - 4.3. Freq Period. Get the frequency period by clicking the date button. You cannot manually input the date If no date created yet just exit this module and go to *Frequency Period* pulldown menu and input the date there.
 - 4.4. Click toolbar Generate. If in case the toolbar Generate is disabled just click the combo box of location. Note for the super user, you cannot process location for ALL. You need a specific location.

8	GENERATE MONTH	LY PM WORK ORDERS		×
Generate Close		Work (Ø Order <u>P</u> eriod	Help
Location: Work Order No.:	ALL \$			
Freq. Period : Date From:	/_/	Ъ: _/_/]	
of the lowest will be wave in Meaning no PM will be gen This procedure will create a Work Order's will be move Note : If the Equipment has	nstead it is made together erated for the PM of the lo new Preventive Maintena to Work Order History ma	n the next frequency/period. T with the highest frequency/p west frequency/period. ance Work Order cycle. All co anually in the Work Order Pul er will be generated. If the Eq c Order schedule will be the F	eriod. ompleted/uncom I down Menu. uipment has PN	/ Task

Figure 4. : Generate Monthly PM Work Order

4.5. To view the generated work order close this module and click the Toolbar *Work Order*.

Note : You can still reprocess the Monthly work order here provided no Work Order schedule has been update.

- - 		lete <u>S</u> av				× C <u>l</u> ose		<i>∢</i> <u>H</u> elp
Refresh Fro	om Date : 🛛	1/01/2013	To Date :	01/31/2013	Period	: Monthly	PM/CM	Preventive 🗧
PERIOD	FROM	TO DATE	SCHEDULE W	W.O. NO.	DESCRIPTION		ID	EQUIPMENT NAME
Nonthly	01/01/2013	01/31/2013	Jan. 1, 2013 - Tue	AKIC-13-00001	PREVENTIVE M	AINTENANCE	10E-1.0T-030	1TR Split Type ceilin
Monthly	01/01/2013	01/31/2013	Jan. 1, 2013 - Tue	AKIC-13-00003	PREVENTIVE M	AINTENANCE	10E-1.5T-013	1.5TR Split Type ceil
Monthly		01/31/2013	Jan. 1, 2013 - Tue	AKIC-13-00002	PREVENTIVE M		10E-1.5T-012	1.5TR Split Type ceil
Monthly	01/01/2013		Jan. 9, 2013 - Wed	AKIC-13-00004	PREVENTIVE M		10E-1.5T-018	1.5TR Split Type ceil
Monthly	01/01/2013	01/31/2013	Jan. 10, 2013 - Thu	AKIC-13-00005	PREVENTIVE M		TR-EF-003	Exhaust Fan KHEF-
Quarterly	01/01/2013	01/31/2013	Jan. 6, 2013 - Sun	SDA-13-00029	PREVENTIVE M		5F-10H-AHU-5B	10hp Air Handling U
Quarterly	01/01/2013		Jan. 6, 2013 - Sun	SDA-13-00033	PREVENTIVE M		6F-15H-AHU-6B	15hp Air Handling U
Quarterly	01/01/2013		Jan. 6, 2013 - Sun	SDA-13-00032	PREVENTIVE M		6F-15H-AHU-6A	15hp Air Handling U
Quarterly		01/31/2013	Jan. 6, 2013 - Sun	SDA-13-00030	PREVENTIVE M		5F-10H-AHU-5C	10hp Air Handling U
Quarterly	01/01/2013		Jan. 6, 2013 - Sun	SDA-13-00031	PREVENTIVE M		5F-20H-AHU-5A	20hp Air Handling U
Annual	01/01/2013	01/31/2013	Jan. 13, 2013 - Sun	SDA-13-00048	PREVENTIVE M		14F-5H-BOOST-01	5HP Booster Pump
Search By	01/01/2013	LE_DATE	Jan. 13, 2013 - Sun		PREVENTIVE M	AINTENANCE	4F-15H-AHU-4B1	15hp Air Handling U ► All ►
Search By		LE_DATE	•	s Needed			ncy: ALL	, ĭ,
Search By		LE_DATE	•	s Needed	Filter By I	Location/Freque	ncy: ALL	All +
Search By Work Order	Information	LE_DATE	W. <u>O</u> . PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Work Order	Information	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Search By Work Order	Information	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Search By Work Order	Information	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Search By Work Order	Information	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Search By Work Order	Information	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Search By Work Order	Information	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Search By Work Order	Information	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Work Order	Information W	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque Don Due Status 13 ⊖ No	e v Stat <u>u</u> s v Date Done Perfe	All +
Search By Work Order	Information W	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque	e ▼) Stat <u>u</u> s ▼	All +
Work Order	Information W	LE_DATE	W.Q. PM Materials	s Needed	Filter By I	Location/Freque Don Due Status 13 ⊖ No	e v Stat <u>u</u> s v Date Done Perfe	All +

5. In the toolbar Work Order you can view the created Preventive Maintenance you just processed and here you can print it. You can still edit the information and the Task here.

Figure 5 : Work Order List

- 5.1. Select location and Frequency by clicking the location combobox and frequency combobox. Use All in the frequency to view all frequency.
- 5.2. Select Preventive. Usually the default is Preventive.
- 5.3. Select a Date Range. You can view different range of date by just changing the From Date To Date or a specific month only from day 1 to end of that month.
- 5.4. Information of the specific equipment. You can still edit the Est. Sched Date here but the other cannot be edited. W.O. Description must have an inputted data.
- 5.5. W.O PM Tasks. This is where the Preventive Maintenance can be viewed or edited. You can still edit the PM Task here. This is also where you update every task whether it is already done, date done, performed by, and make a remarks. See Figure 5.1.

Note : You can also manually created a Work Order here.

Figure 5.1 : Work Order Preventive Maintenance Task

The icon for add, edit, delete button can still be used here even the PM Task here were created during Generation. The Done button is used to update the PM Task individually while the Status is used to update the Task for all the PM Task here.

2			ĽΥ	VORK C	ORDER LIST	j Num	iber of reco	rds : 2	/54		
<mark>-</mark> Add		klete Sa			n 🔁 🖉	a Print	 Su <u>m</u> mary	,	× C <u>l</u> ose		<u>H</u> elp
Refresh Fr	om Date : 🛛	1/01/2013	🥑 🍯	Date :	01/31/2013	1	Per	iod: N	<i>Nonthly</i>	PM/CM	A: Preventive 🗘
PERIOD	FROM	TO DATE	SCHEDULE V	V	W.O. NO.		DESCRIPTIC	N		ID	EQUIPMENT NAME
Monthly	01/01/2013	01/31/2013	Jan. 1, 2013 ·	Tue	AKIC-13-0000)1	PREVENTIVE	MAINT	ENANCE	10E-1.0T-030	1TR Split Type ceilin
Monthly	01/01/2013	01/31/2013	Jan. 1, 2013 -	Tue	AKIC-13-0000	3	PREVENTIVE	E MAINTE	ENANCE	10E-1.5T-013	1.5TR Split Type ceil
Monthly	01/01/2013	01/31/2013	Jan. 1, 2013 ·	Tue	AKIC-13-0000	2	PREVENTIVE	MAINT	ENANCE	10E-1.5T-012	1.5TR Split Type ceil
Monthly	01/01/2013	01/31/2013	Jan. 9, 2013 ·	Wed	AKIC-13-0000)4	PREVENTIVE	MAINT	ENANCE	10E-1.5T-018	1.5TR Split Type ceil
Monthly	01/01/2013	01/31/2013	Jan. 10, 2013	- Thu	AKIC-13-0000)5	PREVENTIVE	MAINT	ENANCE	TR-EF-003	Exhaust Fan KHEF-
Quarterly	01/01/2013	01/31/2013	Jan. 6, 2013		SDA-13-0002	9	PREVENTIVE	MAINT	ENANCE	5F-10H-AHU-5B	10hp Air Handling U
Quarterly	01/01/2013	01/31/2013	Jan. 6, 2013 ·	Sun	SDA-13-0003	3	PREVENTIVE	MAINT	ENANCE	6F-15H-AHU-6B	15hp Air Handling U
Quarterly	01/01/2013	01/31/2013	Jan. 6, 2013	Sun	SDA-13-0003	2	PREVENTIVE	MAINT	ENANCE	6F-15H-AHU-6A	15hp Air Handling U
Quarterly	01/01/2013	01/31/2013	Jan. 6, 2013	Sun	SDA-13-0003	0	PREVENTIVE	MAINT	ENANCE	5F-10H-AHU-5C	10hp Air Handling U
Quarterly	01/01/2013	01/31/2013	Jan. 6, 2013	Sun	SDA-13-0003	1	PREVENTIVE		ENANCE	5F-20H-AHU-5A	20hp Air Handling U
Annual	01/01/2013	01/31/2013	Jan. 13, 2013	- Sun	SDA-13-0004	В	PREVENTIVE	MAINT	ENANCE	14F-5H-BOOST-01	5HP Booster Pump
Quarterly	01/01/2013	01/31/2013	Jan. 13, 2013	- Sun	SDA-13-0003	7	PREVENTIVE	MAINT	ENANCE	4F-15H-AHU-4B1	15hp Air Handling U
Quarterly	01/01/2013	01/31/2013	Jan. 13, 2013	- Sun	SDA-13-0003	7	PREVENTIVE	MAINT	ENANCE	4F-15H-AHU-4B1	15hp Air Handling U
Quarterly ∢ Search By			Jan. 13, 2013	- Sun	SDA-13-0003	7			ENANCE		15hp Air Handling U
Search By		ILE_DATE				7					. ĭ.
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Search By Work Order	III SCHEDU	ULE_DATE	÷	laterials No. of	Needed		Filter E	By Locati	ion/Freque	ncy: ALL	¢ All ↓
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5.6. W.O. PM Materials Needed. Here you can input the materials needed for this Work Order. See Figure 5.2. below.

Figure 5.2. : Work Order Material Needed.

The icon for add, edit, delete, save, cancel can be used for that purpose. All the materials needed to repair maintain the equipment must be encoded here. After all the necessary information in inputted you can view the reports by just clicking Print or Summary in the toolbar.

5.7. Print. View the actual Work Order Preventive Maintenance Report. See sample below. Figure 5.3.



PROPERTY SPECIALISTS TEAM (PROSPECT), INC.

 WORK ORDER NO.:
 AKIC-13-00003

 EQUIPMENT CODE:
 10E-1.5T-013

 EQUIPMENT NAME:
 1.5TR Split Type ceiling mounted

 LOCATION:
 SUB-LOCATION:

PERIOD : Monthly RANGE DATE : Jan 01 to Jan 01, 2013 TASK : Preventive Maintenance ASSIGN TO : Rundate: 03/20/2013 Time: 01:53:58 AM Usr: 1

TASK				AKIC-13-00003			
NO.	TASK LIST		ACNTABLE	Tue Jan 01	Tue Feb 05	Tue Mar 05	Tue Apr 02
NO.				January	February	March	April
	Track conveyor belts. Make sure belts lacing is in g	good condition.					
01	Make sure head and tail rollers are square. If lacing	needs to be					
	replaced trim the belt using a square.						
COSTS							
No.	Technicians	No. o	f hours perfo	rmed		Materials Used	
1	Peter	30 minutes			Paint		
Note : Re	port immediately any abnormal operating condition t	o vour superior for	proper docu	mentation and rep	air and perform im	nediate correction	for those minor
findings		- ,	1				

DONE BY:

CHECKED BY:

ROVING/BUILDING ENGINEER

BUILDING/PROPERTY MANAGER

NOTED BY:

- Figure 5.3 : Work Order Form Preventive Maintenance Report
- 5.8. Summary. View/Print all the created Work Order Preventive Maintenance for a specific range of Date. You can do it by From Date to Date Range. But normally it is 1 month and the Frequency must be All so that all the frequency included in the month. See Figure 5.4. below.



PROPERTY SPECIALISTS TEAM (PROSPECT), INC.

EQUIPMENT SCHEDULING SUMMARY From : 01/01/2013 To : 01/31/2013 PREVENTIVE MAINTENANCE

Work Order Scheduling Summary Report

Rundate:	03/20/2013
Time:	01:54:32 AM
Usr:	1

1 of 3

EQUIPMENT ID/TAG	EQUIPMENT NAME	WORK ORDER NO.	BLDG	SUB-LOCATION	FRE	SCHEDULE DATE	STATUS	DATE DONE	DONE BY
1. 10E-1.5T-012	1.5TR Split Type ceiling mounted	AKIC-13-00002		10th Floor-Room I-1001classroom	Monthly	01/01/13 Tue			
2. 10E-1.5T-013	1.5TR Split Type ceiling mounted	AKIC-13-00003		10th Floor-Room I-1001classroom	Monthly	01/01/13 Tue	9		
3. 10E-1.0T-030	1TR Split Type ceiling mounted	AKIC-13-00001	AKIC	10th Floor-Room I-1014 SHRIM stock room	Monthly	01/01/13 Tue			
4. 10E-1.5T-018	1.5TR Split Type ceiling mounted	AKIC-13-00004	AKIC	10th Floor-Room I-1004 CBMS office 2	Monthly	01/09/13 Wed			
5. TR-EF-003	Exhaust Fan KHEF-3	AKIC-13-00005		Trilles	Monthly	01/10/13 Thu	1		
6. 5F-10H-AHU-5C	10hp Air Handling Unit	SDA-13-00030		Y AREA	Quarterly	01/06/13 Sun	1		
7. 5F-10H-AHU-5B	10hp Air Handling Unit	SDA-13-00029		X3 AREA	Quarterly	01/06/13 Sun	1		
8. 6F-15H-AHU-6B	15hp Air Handling Unit	SDA-13-00033		Y AREA	Quarterly	01/06/13 Sun			
9. 6F-15H-AHU-6A	15hp Air Handling Unit	SDA-13-00032		X AREA	Quarterly	01/06/13 Sun			
10. 5F-20H-AHU-5A	20hp Air Handling Unit	SDA-13-00031		X3 AREA	Quarterly	01/06/13 Sun			
11. 4F-10H-AHU-4B	10hp Air Handling Unit	SDA-13-00034		Theater Mechanical Room	Quarterly	01/13/13 <mark>Sun</mark>			
12.4F-10H- AHU-4C1	10hp Air Handling Unit	SDA-13-00035		Theater Mechanical Room	Quarterly	01/13/13 <mark>Sun</mark>			
13. 4F-10H- AHU-4C2	10hp Air Handling Unit	SDA-13-00036		Theater Mechanical Room	Quarterly	01/13/13 <mark>Sun</mark>			
14. 4F-15H- AHU-4B1	15hp Air Handling Unit	SDA-13-00037		Theater Mechanical Room	Quarterly	01/13/13 <mark>Sun</mark>			
15. GF-1.5T- STAC-11	1.5TR Split-Type ACU	SDA-13-00001	SDA	PABX ROOM	Monthly	01/13/13 <mark>Sun</mark>			
16. 14F-5H- BOOST-01	5HP Booster Pump	SDA-13-00048	SDA		Annual	01/13/13 <mark>Sun</mark>			

Figure 5.4. Work Order Summary Report

You can use in the Work Order list header column to sort the specific column you want it printed.

Q2. How to create a Corrective Maintenance?

6. You can go directly in the toolbar Work Order and create a Corrective Maintenance. See Figure 6.

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Refresh From Date	03/01/2013	6-315 Date :	03/31/2013	<u></u>	Period	Schedule	d	PM/CM :	Corrective
PERIOD FROM	TO DATE	SCHEDULE W	W.O. NO.	DES	CRIPTION		ID		EQUIPMENT NAME
Scheduled 03/18/2	2013 03/18/2013	Mar. 18, 2013 - Mon	SDA-13CM-00	001 trial					none
[∢] Ⅲ						_	:		
Course Dur	DNO.	;			Filter By Lo	ocation/Frequer	ICY: AL	_L	-1
Search By: W.C	_				Filter By Lo	ocation/Frequer	i <mark>cy:</mark> Al	_L 🗳	-1
Search By: W.O	W.O. CM Tasks R	equest W. <u>O</u> . CM Mate			Filter By Lo	ocation/Frequer	i <mark>cy:</mark> Al	_L	-1
Search By: W.C.	DI W.O. CM Tasks R	equest W. <u>O</u> . CM Mate	ð	optn//D aintin			<mark>icy:</mark> Al	_L	-1
Search By: W.C Work Order Information 6-4 Electrical	W.O. CM Tasks R	equest W. <u>Q.</u> CM Mate 6-0 Plumbing	Carpe	entry/Painting		Dthers		_L 🔷	-1
Search By: W.C Work Order Information 6-4 Electrical	DI W.O. CM Tasks R	equest W. <u>O</u> . CM Mate	Carpe	entry/Paintin				_L 🔷	-1
Search By: W.C Work Order Information 6-4 Electrical	DI W.O. CM Tasks Ri 6-5 Mechanical	equest W.O. CM Mate 6-6 Plumbing Dept/Orgar			g 🗆 c	Dthers		L +	-1
Search By: W.C Work Order Information 6-4 Electrical Requested By: Le	MO. CM Tasks R 6-5 Mechanical ex SDA-13CM-00	equest W.O. CM Mate 6-6 Plumbing Dept/Orgar		From	g C	Others	/Director	L +	AII (\$
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Search By: W.C Work Order Information 6-4 Electrical Requested By: Lo Work Order #: W.O. Description: Equipment Id: Building/Location: Sub-Location :	SDA-13CM-00 (Kitchen	equest W.O. CM Mate Plumbing Dept/Orgar 0001	Carpe	Fron Date N Stst Scho Date	n Date : 0; eeded : 0; gned To : 0; entreed : 0; Entered : 0;	Others Dthers Dthers Dthers Dept. Head 3/18/2013 3/18/2013 3/18/2013	/Director	L ♦	AII ⇒ 03/18/2013

Figure 6. : Corrective Maintenance

6.1. Select location by clicking the location combobox. Frequency is automatically disabled

because all

Corrective maintenance has a frequency of Scheduled.

- 6.2. Select Corrective. Usually the default is Preventive. Change it to Corrective.
- 6.3. Select a Date Range. You can view different range of date by just changing the From Date To Date or a specific month only from day 1 to end of that month.
- 6.4. Information of the specific equipment. Sometime Corrective Maintenance has no listed equipment So just input No or any value. And input the Est. Sched Date here. Others cannot be edited. W.O. Description must have an inputted data.
- 6.5. W.O CM Tasks Request. This is where the Corrective Maintenance can be viewed, added or edited. This is where you update every task whether it is already done, date done, performed by, and make a remarks. See Figure 6.1.
- Note : The Work Order No. for the Corrective Maintenance must have a suffix of CM after the 2 digit year when you start the Corrective. After it was done for the first time the system will generate it for you incrementally. In the above figure it is SDA-13CM-00001. Also when there is a preformatted form that the company used please use that number in the last numbering of the W.O. CM.

EQUIPME EQUIPME LOCATIO SUB-LOC	RDER NO. : SDA-13CM-00001 ENT CODE : ENT NAME : none N : SDA BUILDING ATION : Kitchen CTRICAL WECHANICAL	PLUMBING	PERIOD : RANGE DATE : TASK : ASSIGN TO : DATE NEEDED :	Scheduled Mar 18 to Mar Corrective Ma 03/18/2013 ENTRY/PAINTING	18 , 2013 Lintenance	Rundate: 03/20/2013 Time: 07:25:25 AM Usr: 1 RS : engr
TASK NO.	DESC	RIPTION OF WORK REQU	EST		ACCOUNTABLE	SDA-13CM-00001 Mon Mar 18
01	REPAIR					✓ 33/18/13
02	Repair parts					√ _{33/18/13}
03	Corrective for repair					✓ 33/18/13
MATERIA	L USED					
No.	Item No.	ite	em Description		Qua	ntity/Unit
PERFOR	MED BY:	RECEIVED	BY:	N	IOTED BY:	L
ex SIGNATU	RE OVER PRINTED NAME	EC FRONTL	INER	6	UILDING/PROPER	RTY MANAGER

1 of 1

Work Order Report

Example : Work Order Form is 12045 , so now the actual work order must be SDA-13CM-12045 to reference the actual Work Order form used by the company.

Figure 6.1 : Work Order Corrective Maintenance Request

The icon for add, edit, delete button can be used to add, edit and delete a Corrective Maintenance Request The Done button is used to update the CM Request individually while the Status is used to update the CM Request for all the CM Request here.

6.6. W.O. CM Materials Needed. Here you can input the materials needed for this Work Order Corrective Maintenance Request. See Figure 6.2. below.

Figure 6.2. : Work Order CM Material Needed.

The icon for add, edit, delete, save, cancel can be used for that purpose. All the materials needed to repair maintain the equipment must be encoded here. After all the necessary information in inputted you can view the reports by just clicking Print or Summary in the toolbar.

6.7. Print. View the actual Work Order Corrective Maintenance Report. See sample below. Figure 6.3. Figure 6.3. : Work Order Corrective Maintenance Form

6.8. Summary. View/Print all the created Work Order Corrective Maintenance for a specific range of Date. You can do it by From Date to Date Range. But normally it is 1 month and the Frequency must be All so that all the frequency included in the month. See Figure 6.4. below. Work Order Scheduling Summary Report



PROPERTY SPECIALISTS TEAM (PROSPECT), INC.

Rundate: 03/20/2013 Time: 07:26:00 AM Usr: 1

EQUIPMENT SCHEDULING SUMMARY
From : 03/01/2013 To : 03/31/2013
CORRECTIVE MAINTENANCE

EQUIPMENT ID/TAG	EQUIPMENT NAME	WORK ORDER NO.	BLDG	SUB-LOCATION	FRE QUENCY	SCHEDULE DATE	STATUS	DATE DONE	DONE BY
1.	none	SDA-13CM-00001	SDA	Kitchen	Scheduled	03/18/13 Mon	Done	03/18/13 Mon	ex

Figure 6.4. : Work Order Corrective Maintenance Summary Report