Operational Reports

TR Operational Reports:

Report	Description	Options
Setup		
Contact List	This report shows a list of tenant contacts including their Property, Building, Floor, email address and phone number.	**Data Sorting**: Property, Building, Tenant, Tenant Contact.
Employee List	This report shows a list of Employees including their user name, phone, availability, assigned properties, and default property	**Data Sorting**: Property, Role, Availability, Status. **Report Detail**: Select the Show Device checkbox to display the employee's detailed contact information, subscriptions and preferences.
Service Schedules	This report lists the services provided to tenants and their costs. Sort by Request Type to display all services by property with any tenant overrides for each service. Sort by Tenant to first display the default costs for all services, and then display the tenants with their costs for all services.	**Data Sorting**: Property, Tenant, Request Type.
Tenant List	This report shows a list of tenants including their ID, phone, and lease. Click the Tenant name to view complete details of the tenant.	**Data Sorting**: Property, Building, Tenant, Tenant Contact. **Report Detail**: Select the Show Details checkbox to display the building, floor, suite, lease code, and contact details. **Export to Excel Option**: The Export to Excel for this report creates an Excel document with 4 separate worksheets. • **Sheet 1**: Tenant List (outlines property, tenants, tenant ID, phone and lease #) • **Sheet 2**: Contacts (outlines property, tenant, contact name, contact ID, email, phone, and primary location) • **Sheet 3**: Leases (outlines property, tenant, building, lease code, unit code, start date, end date, and active status) • **Sheet 4**: Spaces (outlines property, tenant, building, floor/suite, lease code).
TR Schedule List	This report provides a list of TR schedules along with the frequency and estimated completion time of that schedule. Click the Schedule ID for a detailed view of the Schedule.	**Data Sorting**: Property, Building, Tenant, Assigned To, Status, Tenant.
Vendor List	This report shows a list of vendors including their address, phone, fax, contract and COI expiration dates, availability, assigned properties, and default property.	**Data Sorting**: Property, Availability, Status, Vendor Name. **Report Detail**: Select the Show Details checkbox to select it, this displays the primary, secondary, and after hours contacts.
Work Orders		
Request & Work Order Status Count	This report shows a count of Work Orders that have a status of Open, Delayed, Cancelled, or Work Completed, where the due dates are within the selected date range. The numbers also include a count of the new and open Tenant Requests that do not have associated Work Orders.	**Data Sorting**: Property, Building, Tenant, Assigned To, Trade, Request Type, Priority, Dates.
Tenant Requests & TR Work Orders	This report shows all Work Orders generated from Tenant Requests where the due date is within the selected date range. It also includes any Tenant Requests that do not have Work Orders. Click the Work Order ID for a detailed view of the Work Order.	**Data Sorting**: Property, Building, Tenant, Assigned to, Owned by, Trade, Request Type, Status, Dates. **Report Detail**: Select the Show Details checkbox to display more information about the Work Order, including tenant contact information and history details. Select the Show History checkbox to enable the history radio button choices. Choosing the All Histories button will show all histories for the work order; choosing the Only Manual Histories button will show only Delayed, Cancelled, Work Started, Work Completed, and Reopened histories for the work order. **Note:** • History Details is not included in the Excel version of the report. Select the Show Services checkbox to display any services provided and billing details. Select the Show Older Than checkbox to display only New,

		Open, and Delayed Work Orders that are overdue by the number of days entered in the box next to it.