

Operational Reports

PM Operational Reports:

Report	Description	Options
<i>Planning</i>		
Combined TR & PM Resources Forecast	This report shows projected Scheduled and On-Demand Work Hours for TR and PM for the next 4 weeks. If this report is being run on a Monday, the forecasted weeks begin on this Monday. If this report is being run any other day of the week, the run date can be either the past or next Monday.	Data Sorting: Property, Run date.
PM Forecasted Man-hours	This report provides a summary of estimated monthly Task numbers and completion times for up to 12 months from today. The backlog shows all Work Orders that are due before today that have not been Completed or Cancelled.	Data Sorting: Property, Number of Months.
<i>Setup</i>		
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.
Equipment List	This report shows a property's Equipment and Equipment details, including the location, make, model, serial number, asset code and warranty expiry of the Equipment. Click the Show Notes checkbox to select it, this will display any notes associated with the equipment.	Data Sorting: Property, Building, System, Equipment. Report Detail: Select the Show Notes to show any associated equipment notes.
PM Schedule List	This report provides a list of Schedules for Equipment maintenance along with the frequency and estimated completion time of the Schedule. Click the Schedule ID for a detailed view of the Schedule.	Data Sorting: Property, Building, System, Equipment, Task, Status.
Task List	This report provides a list of Tasks including the recommended period, estimated time, and trade.	Data Sorting: Property, Task, Trade. Report Detail: Select the Show Details checkbox to display the Task lines.
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 display more information, including TR and PM dispatch names, primary and secondary contact info, availability, devices and addresses.
<i>Work Orders</i>		
PM History Summary	This report lists completed Work Orders by Schedule ID that were due within the selected date range. Click the Schedule ID to view complete Schedule details.	Data Sorting: Property, Building, System, Equipment, Task, Assigned To, Trade, Dates. Report Detail: Select the Include Cancelled checkbox to select it, this will also list cancelled Work Orders that were due within the selected date range.
PM Work Orders	This report shows all Work Orders generated from Schedules and all on-demand Work Orders where the due date is within the selected date range. Click the Work Order ID to view complete details.	Data Sorting: Property, Building, System, Equipment, Assigned To, Trade, Status, Dates. Report Detail: Select the Show Details checkbox to select it; this will display more information about the Work Order, including Task and Task Line details.