

Preventive Maintenance User Guide



Scheduling and managing maintenance cycles for building equipment





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Overview

Preventive Maintenance Manager provides tools to schedule and dispatch equipment maintenance and repairs, and track those repairs throughout the maintenance cycle. Additionally, standard equipment templates may be associated with specific pieces of equipment, and with industry standard maintenance tasks and schedules, assuring easy set-up and standardization.

Standard Equipment Templates

Equipment Templates allow you to define the steps and frequency of work for specific types of building equipment. Utilizing the templates allows you standardize your maintenance program and expedite any future step changes.

WARNING: All changes to Templates at the Portfolio Template Library level affect all building level equipment to which it is linked. This includes, but is not limited to, any edits, additions or deletions made to template tasks. Once equipment in multiple buildings has been associated to specific templates, any template changes should be made carefully.

Note: You may not have access to this functionality with your existing account permissions. To add the permission, please contact your system administrator or your Building Engines Client Account Manager for details.

Creating a Preventive Maintenance Template

This section describes the process of creating a new equipment template.

To create a new template:

- 1. Click Go To → Preventative Maintenance → Template Library.
- 2. Select a Template Library.

GO TO	ADMIN	V 💩 Enter Request Numbe	er 🔎	Support	•	•
Tem	plate Library	0	Select		~	

- 3. Click 🕒
- 4. Enter a template **NAME** and select a **CATEGORY**.
- 5. (Optional) Use the **NOTES** box to enter additional template information.
- 6. Click **SAVE**.

7. After you click **SAVE**, additional tabs become available that allow you to complete the template setup. All information added at the template level is automatically carried down to the equipment tied to the template.

GO TO ADMIN		V 🚖 Enter Requ	est Numbe	er	Q	Suppor	rt 😑
template Library			Equipme	nt Templates		~	I (+)
Type to filter	TEMPLATE	TASKS AUDIT	FILE	S HISTOR	1		
ELECTRICAL - Electrical Panels	NAME *			NOTES			
V ELECTRICAL - Motor Control Centers	Large Air Handlers			в <i>1</i>	и с	2 /	
V ELECTRICAL - Variable Frequency D	CATEGORY *			0 0	<u> </u>		1
V ELEVATORS	HVAC - Air Handli	ng Equipment	\sim	40	≡ <u>I</u> x		J

- a. **TASKS** add periodic maintenance tasks to the template.
- b. **AUDIT** review building equipment that is currently connected to the template.
- c. **FILES** add or view any documents attached to the template.
- d. **HISTORY** review date/time stamped history for template activity.

Managing Tasks in the Portfolio Template Library

This section describes the process of modifying an existing equipment template.

WARNING: All changes to Templates at the Portfolio Template Library level will affect all building level equipment to which it is linked. This includes, but is not limited to, any edits, additions or deletions made to template tasks. Once equipment in multiple buildings has been associated to specific templates, any template changes should be made carefully.

To manage an existing template:

- 1. Click Go To → Preventative Maintenance → Template Library.
- 2. Select a Template Library.
- 3. Using the list of templates on the left side, select the template you want to edit.
- 4. Click the **TASKS** tab.

	\$ ≈	TEMPLATE	TASKS	AUDIT	FILES	HISTORY
al Panels	*	NAME *			NO	TES

- 5. Click ⁽¹⁾, and select **New Task**.
 - a. Enter a **NAME** for the task.
 - b. Enter the **COMPLETE IN (DAYS)**. *Note: When a task remains open beyond the specified amount of* **Complete In days** *it becomes overdue*.
 - c. (Optional) Enter the **EXPECTED (HRS)** the task takes to complete.
 - d. Select a **FREQUENCY**.
 - e. (Optional) Add **NOTES**, **STEPS**, **PARTS AND TOOLS**, and **METER READINGS** to populate the body of the task.
- 6. Click SAVE.

To edit a task:

- 1. Open an existing task.
- 2. Make edits as necessary and click **SAVE**.

To delete a task:

- 1. Open an existing task.
- 2. Scroll to the bottom of the task and click **DELETE**.

To audit which equipment is currently connected to the template:

- 1. Open an existing task.
- 2. Click AUDIT.
- 3. View equipment list.

Searching for a Preventive Maintenance Template

This section describes how to search for an existing preventive maintenance template.

To search for a template:

- 1. Click Go To → Preventive Maintenance → Template Search.
- 2. Click **SEARCH** or use the column filters to locate the desired template.

Configuring PM Equipment and Tasks

This section describes the process of adding new equipment, creating schedule and unscheduled tasks, associating templates, and adding documents.

Adding New Equipment

Equipment can be added to a building via two ways. You can either create the equipment from scratch, or leverage the copy feature in the Portfolio Template Library.

To create a piece of equipment from scratch:

- 1. Click **Go To** → **Preventative Maintenance** → **Equipment Library**.
- 2. Select a building from the building field.

GO TO	ADMIN	V 💩 Enter Request Number	Q	Support	•
Equi	pment Library	Select Building		~	¢

- 3. Click 🕒.
- 4. Enter the equipment **NAME** and **CATEGORY**.
- 5. (Optional) Add any additional details as they are available (Location, Make, Model, Serial Number, etc.).
- 6. Click **SAVE** to create the equipment record, and unlock the equipment tabs.

GO TO ADMIN	~ .	🚊 En	Enter Request Number					
Equipment Library					Cedar Landir	gs	*	(
er	≈ ≈	EQUIPMENT	COMPONENTS	TAS	KS FILES	HISTOR	Y MORE	
ECTRICAL - Motor Control Centers	-		S	SERIAL N	UMBER		Price & Co	
AC - Boilers								vet
am Boilers:#1		NAME *	4	SSET T	AG			at
am Boilers:#2		Steam bollers						_

To copy a piece of equipment from the Template Library:

- 1. Click Go To → Preventative maintenance → Equipment Setup.
- 2. Select the **Destination Property** and the template **Category** that the equipment template is being copied to.

3. Click **Search**, and the templates from the selected category appear.

CA GO TO ADMIN	New Look	Support	Log Out
PREVENTIVE MAINTENANCE Equipment Setup			
Search of Equipment Templates Destination Property: Cedar Landings Category: ELECTRICAL - Electrical Panels	ipment:		Search
2. Choose Equipment by entering the number to copy. Equipment/Components Counts Select equipment by entering the number you want to copy in the "Counts" column. For example, if 5 is entered for the equipment this will result in 5 new pieces of equipment. Panelboards Switchboards Transformers	Cedar Cedar Cedar Cedar Curr Cur	Landings ECTRICAL - M AC - Boilers AC - Cold Box AC - Exhaust f E SAFETY - F JMBING - Wat	otor Control Centers es Fans ire Pumps er Heaters
Next ->			

- 4. Enter the equipment number in the **Counts** field, and click **Next ->**.
- 5. Enter a **Name** and **Location** for the new pieces of equipment.
- 6. Select an **Assignee**, and click **Finish**.

Searching for Equipment

This section describes how to locate a piece of equipment in your equipment library.

To search for a piece of equipment:

- 1. Click Go To → Preventative Maintenance → Equipment Search.
- 2. Use the **SEARCH** or column filters to locate the desired piece of equipment.

4	😵 Equipment Search 🖤											
Sea	Search Criteria: Property(s): Cedar Landings											
7	SEARCH DEP	AULT VIEW Y Save View				4 A	CTIONS V	< SHARE	✓ [→ EX	Port 🗸		
	TYPE	NAME 🔨	PROPERTY	CATEGORY	STATUS	FLOOR	SUITE	LOCATION	MAKE	MODEL		
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter		
	- A											

Associating a Piece of Equipment to a Template

Associating a piece of equipment to a template pushes all of the template tasks to the piece of equipment. This section describes associating a template to a piece of equipment.

To associate a piece of equipment to a template:

- 1. Click Go To → Preventative Maintenance → Equipment Search.
- 7 www.buildingengines.com | (866) 301-5300 | support@buildingengines.com 📣 BuildingEngines

- 2. Use the **SEARCH** or column filters to locate the desired piece of equipment.
- 3. Select the piece of equipment from the search grid.
- 4. Click **MORE**, and select **Template**.

≈	EQUIPMENT	COMPONENTS	TASKS	FILES	HISTORY	MORE			
^		SERIAL NUM	IBER	Capital	lanning t				
	NAME * Exhaust Fan, Belt- Driven		ASSET TAG						
	STATUS * Operational	~	VENDOR			COST LIMIT %	<u>^</u>		

5. Select an **EQUIPMENT** template and click **ASSOCIATE**.

	* *	EQUIPMENT	COMPONEN	ITS	TASKS	FILES	HISTORY	MORE		
s	Template Ma	nagement			SERIAL NUM	BER		Price	alCost 🛞	
	All equipment in associated with the Equipment T by using the 'Pro below. Template definition for a p Equipment Temp associates the o with the new tem	this Building ma equipment temp emplates templa mote' or 'Associa promotion copia iece of equipmen plate Library and urrent piece of en nplate.	y be lates in te library ate' action tes the to the tuppment s	Template Association allows you to bind a specific piece of equipment to a template in an Equipment Template Library. Tasks defined in the Template are added the Equipment task list. To associate this piece of equipment with a different Template, you must first disassociate it from its current Template. You can choose to maintain any Building-level tasks that have been created for this piece of equipment.						
	PROMOTE			Curre QUIPI Selec	ntiy not ass MENT at	ociated w	vith any Equip	ment i en	plate. Urements	
				Seleo Exha Exha	ASSOCIATE					
		MAKE						AMPS	CANCEL	

- 6. The piece of equipment is now be linked to the selected template and any tasks on this template are automatically copied to the piece of equipment.
- 7. To remove an association from this template, click **DISASSOCIATE**. *Note: your access level may not allow you to view the* **Template** *tab*.

Adding a Task to Equipment

This section describes how to add an additional task to a piece of equipment.

To add a task:

- 1. Click Go To → Preventative Maintenance → Equipment Search.
- 2. Use the **SEARCH** or column filters to locate the desired piece of equipment.
- 3. Select the piece of equipment from the search grid.
- 4. Click the **TASKS** tab.
- 5. Click $\textcircled{\bullet}$, and select **New Task**.

E		MPONENTS	TASKS FIL	ES HISTORY	MORE	
					8	88 4
	TASK	OCCURS	NEXT	ASSIGNED TO	SEASONAL	New Task New Unschedule
	Exhaust Fan, Belt Driven	Semi- Annual	09/02/2014	Joe Giarusso		New Inspection

- 6. Enter the task NAME, NEXT (fire) DATE, COMPLETE IN (DAYS), EXPECTED (HRS), FREQUENCY, and ASSIGNEE.
- 7. (Optional) Add NOTES, STEPS, PARTS AND TOOLS, and METER READINGS.
- 8. Click **SAVE**.
- 9. (Optional) To delete a task, select the box next to the **TASK** and click \bigotimes .

E	QUIPMENT	СОМ	PONENTS	TASKS	FILES	HISTORY	MORE		
								63	∂⊗ ⊕
	TASK		OCCURS	NEXT	AS	SIGNED TO	SEASO	NAL	TYPE
V	Exhaust Fa Belt Driven	ın,	Semi- Annual	09/02/20	14 Jo	e Giarusso			Ъr,

Creating an Unscheduled Task

Unscheduled tasks may be used to document unplanned repair work performed on a piece of equipment during the course of other maintenance. Unscheduled tasks may be created from the PM task or from the equipment record. To create an unscheduled task from within a PM task:

1. Click **ADD UNSCHEDULED**.



 Enter a NAME for the task, select an ASSIGNEE, and enter the number of days allotted to complete the work. Additional task notes can be entered in the NOTES field.

ASSIGNED TO					Theorem
Add Unscheduled					\otimes
UNSCHEDULED TASKS Motor Control Co	^{ente} NOTES				
None Available	в	<u>ι</u> υ.	s & &	<u>T</u> , T	
NAME*					
oti					
e nature of the equipment controlled by thi wh ASSIGN TOge on energized equipment.	s pa				n. U
Select V	· .				
	2				
dit vetalls					
leps					
					SAVE CANCEL

3. Click **SAVE**.

Creating an Unscheduled Task from the Equipment Record

If a problem is discovered with a piece of equipment and an open PM task does not exist, an unscheduled task can be created from the equipment record.

To create an Unscheduled Task:

- 1. Click Go To → Preventative Maintenance → Equipment Search.
- 2. Use the **SEARCH** or column filters to locate the desired piece of equipment.
- 3. Select the piece of equipment from the search grid.
- 4. Click the **TASKS** tab.

5. Click \oplus , and select **New Unscheduled Task**.

E	QUIPMENT	СОМ	PONENTS	TASKS	FILES	HISTORY	MORE		
								Ð	$\Theta \otimes \Phi$
	TASK		OCCURS	NEXT	AS	SIGNED TO	SEASO	NAL	New Task New Unschedule
	Exhaust Fa Belt Driven	n,	Semi- Annual	09/02/201	4 Joe	e Giarusso			New Inspection

- 6. Enter a **NAME** for the task, select an **ASSIGNEE**, and enter the number of days allotted to complete the work. Additional task notes can be entered in the **NOTES** field.
- 7. Click **SAVE.**

Adding a File to Piece of Equipment

The Files tab allows you to add documents, pictures, schematics, and videos to a piece of equipment's tasks. These resources can be accessed as a reference via the mobile application when the equipment is being serviced.

To add a file to a piece of equipment:

- 1. Click Go To → Preventative Maintenance → Equipment Search.
- 2. Use the **SEARCH** or column filters to locate the desired piece of equipment.
- 3. Select the piece of equipment from the search grid.
- 4. Click the **FILES** tab.
- 5. Click •

6. Use the **ADD FILES** function to access your computer hierarchy and select the document you wish to attach, or drag and drop the file into the window.

	Upload New Fil	es(s)		\otimes
ld F Id I Ani	Select files to uploa	d, to enter a title double clic	ck the file name after	uploading.
				Î
		Drag files here.		
	• ADD FILES		0%	0 kb
			SAVE C/	ANCEL

7. Click **SAVE**.

Managing PM Tasks

This section describes the common day-to-day functionality associated with maintaining your preventive maintenance program.

Using the Preventive Maintenance Task Calendar

The task calendar provides you with a monthly, weekly, and daily breakdown of the preventive maintenance tasks assigned to you and your colleagues.

Note: For full functionality instruction on the Task Calendar, see the **Task Calendar User Guide**.

To access the task calendar:

- 1. Click **Go To** → **Task Calendar**.
- 2. Click **SEARCH** and select a **BUILDING**.
- 3. (Optional) Use the additional **SEARCH** fields to filter the calendar by due date, task type, and assignee.

4. Click **SEARCH**.

			VIEW BY				
			View By Fire Date	~			
ONTH W	EEK DAY		SHOW BY ()	5			Y SEARCH
	Mon	Τι	Show By Building	~	Fr	ri	Sat
			BUILDING			1	2 🔺
	27	27	Berkshire Crossing		at the	1	
	1	1	ASSIGNEE		1	1	
3	4			×	7	8	9
			TYPES				
	1	2	1 selected	~	1		
			Limit To Overdue				
10	11		12	13	14	15	16
	1	× 2	SEARCH	CANCEL	2		

Completing the Steps on a Preventive Maintenance Task

This section describes the process of completing the steps on a preventive maintenance task from the desktop version of the application.

To complete the steps on a PM task:

- 1. Navigate to the specific New or Open PM Task.
- 2. Click the **Steps** section to expand.
- 3. As steps are completed, click either **Done** or **N/A** (Not Applicable). Note: Certain Steps may be required before the PM Task may be changed to the Completed status.



K Labor and Materials \$0.00

Entering Meter Readings on a Preventive Maintenance Task

This section describes the process of entering the meter readings that are associated to the preventive maintenance tasks.

To enter meter readings on a PM task:

- 1. Navigate to the specific New or Open PM Task.
- 2. Click the **Meter Readings** section to expand the field.
- 3. Enter the meter readings into the provided fields.

🙀 Meter Readings			^
READINGS	LOCATION	AMOUNT	UNITS
1. Compressor Phase 1		\$	Amps
2. Compressor Phase 2		\$	Amps
3. Compressor Phase 3		\$	Amps
			SAVE

4. Click **SAVE**. **<u>WARNING!!</u> You MUST click <u>SAVE</u> after entering meter reading data for the application to properly save your readings** Note: The system will alert you if any meter readings are outside of any specified range.

Changing the Status of a Preventive Maintenance Task

This sections describes the process of changing the status of a preventive maintenance task.

To change status from the **Search Tasks** page:

- 1. Select the checkboxes to the left of the PM Task (or group of PM Tasks) to make a status change.
- 2. Click the **Actions** dropdown and select **Change Status**.

$\mathbf{\mathbf{\hat{Y}}}$	SEARCH Req	uest #	> DEFAULT V	IEW 🗸 🗸	Save View				ACTIONS	< shar	e 🗸 🗠	EXPORT 🗸
	TYPE @	REQUEST	PROPERTY .	ASSIGNEE	STATUS 🔹	TASK @	EQUIPMEN.	CATEGORY.	Change Status	DUE	CHARGES	NOTE
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Print Selected	Filter	Filter	Filter
V	₹.	151383214	Cedar Landings	Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00	
V	<u>مح</u> د،	151383206	Cedar Landings	Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00	
V	، ح ت	151348039	Cedar Landings	Joe Giarusso	Open	Motor Control Center	Motor Control Centers	ELECTRICAL - Motor Control	01/26/2015	02/25/2015	\$0.00	Due to the nature of the

- 3. If changing the status to **Complete**, an option will be provided to manually set the completion date and time.
- 4. Change the task status, add a comment if applicable, and click **SAVE**.

To change the status from within a specific PM Task:

1. Click CHANGE STATUS.

Hotor C Washington	Motor Control Center - #151348033 Washington Avenue - {BEI DEMO - CARL}						
ASSIGNED TO: Joe Giarusso Joestarus: TASK: EQUIPMENT: FREQUENCY:	Open Motor Control Center Motor Control Centers Annually	PROPERTY: TENANT: CREATED:	Washington Avenue {BEI DEMO - CARL} 01/26/2015 12:05 AM				
Task Note: Due to the nature of the equ caution when working on er	FREQUENCY: Annually Task Note: Due to the nature of the equipment controlled by this panel, it may not be possible to completely depending this equipment during this inspection. Use caution when working on energized equipment. REASSIGN Preassign Preassign						

- 2. If changing the status to **Complete**, an option will be provided to manually set the completion date and time.
- 3. Change the task status, add a comment if applicable, and click **Save**.

Reassigning a Preventive Maintenance Task

This sections describes the process of reassigning a preventive maintenance task.

To reassign from the **Search Tasks** page:

- 1. Select the checkboxes to the left of the PM Task (or group of PM Tasks) to be reassigned.
- 2. Click the **Actions** dropdown and select **Reassign**.

$\mathbf{\mathbf{\hat{Y}}}$	SEARCH Req	uest #	> DEFAULT V	iew 🗸	Save View				5 ACTIONS	< shar	e 🗸 🔁	EXPORT 🗸
V	TYPE .	REQUEST	PROPERTY .	ASSIGNEE	STATUS 🔹	TASK @	EQUIPMEN.	CATEGORY.	Change Status	DUE	CHARGES	NOTE
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Print Selected	Filter	Filter	Filter
V	وچې	151383214	Cedar Landings	Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00	
V	<u>محم</u>	151383206	Cedar Landings	Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00	
V	، <i>ح</i> توہ	151348039	Cedar Landings	Joe Giarusso	Open	Motor Control Center	Motor Control Centers	ELECTRICA - Motor Control	L 01/26/2015	02/25/2015	\$0.00	Due to the nature of the

3. In the dialog box, select the appropriate assignee, notification method, and add a message if applicable.

4. Click **SAVE**.

To reassign from within a specific PM Task:

1. Click **REASSIGN**.

Hotor Con Washington Ave	$\bigcirc \langle 2 \atop 4 \rangle$		
ASSIGNED TO: Joe Giarusso Joes Ciarusso TASK: EQUIPMENT: FREQUENCY:	Open Motor Control Center Motor Control Centers Annually	PROPERTY: TENANT: CREATED:	Washington Avenue {BEI DEMO - CARL} 01/26/2015 12:05 AM
Task Note: Due to the nature of the equipm caution when working on energi	ent controlled by this panel, it may not be pos zed equipment.	ssible to completely de-energize this ensurements and the status and change status	qipment during this inspection. Use

- 2. In the dialog box, select the appropriate assignee, notification method, and add a message if applicable.
- 3. Click **SAVE**.

To reassign a group of PM Tasks:

1. Click Go To \rightarrow Preventive Maintenance \rightarrow Task Reassign.

GO TO ADMIN		New Lo	ok 😑 Support	Log Out	
PREVENTIVE MAINTENANCE	Task Reassign	roperty: Cedar Landings 💌			
Option 1 (Engineer to Engi Assign From: Select Assign To: Select Assign	neer)	Option 2 (Equipment to Eng Category: Select Equipment: Select Assign To: Select	gineer) ▼		

- 2. Select **Option 1** or **Option 2**, and click **Assign**.
 - a. **Option 1**: Assign all PM tasks from one engineer to another engineer.
 - b. **Option 2**: Assign all PM tasks for a specific piece of equipment or equipment category to a specific engineer.

Adding a Comment to a Preventive Maintenance Task

This section describes how to add a comment to a Preventive maintenance task.

To add a comment to a PM task:

- 1. Locate and open the PM Task.
- 2. Click ADD COMMENT.

Moto Washing	r Control Center - #1513 gton Avenue - {BEI DEMO - CARL}	348033	\bigcirc $\langle 2 \\ 4 \rangle$
ASSIGNED T JOE Giart TASK: EQUIPMENT: FREQUENCY:	TO: JSSO Open Motor Control Center Motor Control Centers Annually	PROPERTY: TENANT: CREATED:	Washington Avenue (BEI DEMO - CARL) 01/26/2015 12:05 AM
Task Note: Due to the nature of the caution when working	he equipment controlled by this panel, it may not g on energized equipment.	be possible to completely de-energ	TIZE this eqipment during this inspection. Use

- 3. Enter your comment and click **SAVE**. The comment will appear with a date/time stamp in the History panel for the PM Task.
- 4. The comment can be marked as Internal by clicking the **Keep comment internal** checkbox.

Adding a File to a Preventive Maintenance Task

The Files section allows you to add documents, pictures, schematics, and videos to a Preventive Maintenance task.

To add a file to a Preventive Maintenance task:

- 1. Locate and open a Preventive Maintenance task.
- 2. In the **Files** section of the task, click $\textcircled{\bullet}$.



3. Use the **ADD FILES** function to access your computer hierarchy and select the document you wish to attach, or drag and drop the file into the window.

Upload New Files(s)	\otimes
Select files to upload, to enter a title double click	the file name after uploading.
Drag files here.	CHANGESTATUS
ADD FILES	0% 0 kb
	SAVE CANCEL

4. Click **SAVE**.

Sharing a Preventive Maintenance Task

This section describes how to share a Preventive maintenance task.

To share a PM task:

- 1. Locate and open the PM task.
- 2. Click **SHARE**.
- 3. By default a **Subject** and **Body** are provided, however, you may edit this by clicking into the field and updating it.
- 4. Use the recipient selector to designate the recipients. *Note: For full Share recipient selector instruction, see:* **Adding Recipients to a Broadcast or Share Message**.
- 5. Click **SEND**.

Adding Labor to a Preventive Maintenance Task

This section describes how to add labor to a preventive maintenance task.

To add labor to a PM task:

1. Locate and open the PM Task.

2. Click the Add Labor icon in the Labor and Materials section of the task.



- a. From the **Name** drop down, select the name of the staff member or vendor who performed the labor.
- b. Select the appropriate **Labor Rate**.
- c. Enter in the number of hours.
- d. Select a **Markup** (if applicable).
- e. Indicate if this is a billable charge using the provided checkbox.
- 3. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter additional labor rates.

Adding Materials to a Preventative Maintenance Task

This section describes how to add a material to a preventive maintenance task.

To add a material to a PM task:

- 1. Locate and open the PM task.
- 2. Click the **Add Materials** icon in the **Labor and Materials** section of the task.



- a. Optionally, select a category to narrow the list of materials.
- b. Select the appropriate Material.
- c. Provide the quantity.
- d. Select the **Markup** (if applicable).
- e. Indicate if this is a billable charge using the provided checkbox.
- 3. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter additional materials.

SAVE

Placing Preventive Maintenance on Hold

This section describes how to place an entire buildings preventative maintenance program on hold.

To place your Preventive Maintenance schedule on hold:

- 1. Click Admin → Property Settings → PM Holds.
- 2. Select a **PROPERTY** and change the **PM STATUS** to **On Hold**.

Building Setti	ngs		
PROPERTY * North Plaza	~	☐ Include Critical Tasks REASON:★	
PM STATUS * On Hold	~		
To place North Plaza on PM Hold, chang reason the building is being placed on h	ge PM Status to 'On Hold'. Then, enter a old and click Save.	3	

- 3. (Optional) To include critical tasks in the hold, click **Include Critical Tasks**.
- 4. Provide a **REASON** for the hold, and click **SAVE**.

Printing a Preventative Maintenance Task

This section describes how to print a preventive maintenance task.

To print from the **PM Tasks List** page:

- 1. Select the checkboxes to the left of the PM Task (or group of PM Tasks) to be printed.
- Click the Actions dropdown and select Print Selected to generate a printable PDF.

9	SEARCH Red	juest #	> DEFAULT V	iew 🗸 🗸	Save View					< shar	e 🗸 🖄	EXPORT 🗸
V	TYPE @	REQUEST	PROPERTY .	ASSIGNEE	STATUS 🔹	TASK @	EQUIPMEN.	CATEGORY.	Change Status	DUE	CHARGES	NOTE
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Print Selected	Filter	Filter	Filter
V	مچې،	151383214	Cedar Landings	Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00	
V	مچې	151383206	Cedar Landings	Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00	
V	25	151348039	Cedar Landings	Joe Giarusso	Open	Motor Control Center	Motor Control Centers	ELECTRICA - Motor Control	L 01/26/2015	02/25/2015	\$0.00	Due to the nature of the

To print from within a specific PM task:

- 1. Locate and open the PM task.
- 2. Click **PRINT** to generate a printable PDF.

Motor Co Washington Av	$\bigcirc \langle 2 \rangle \\ 4 \rangle$						
ASSIGNED TO: Joe Giarusso TASK: EQUIPMENT: FREQUENCY:	Open Motor Control Center Motor Control Centers Annually	PROPERTY: TENANT: CREATED:	Washington Avenue {BEI DEMO - CARL} 01/26/2015 12:05 AM				
Task Note: Due to the nature of the equipment controlled by this panel, it may not be possible to completely de-energize this eqipment during this inspection. Use caution when working on energized equipment.							