Axis Portal

Preventive Maintenance
User Manual

January 2015

BUILDING VALUE

Login to your Axis Portal at:
http://cp.axisportal.com

Axis Portal Support

Call: (877) 435-7547

Email: AxisSupport@cbre.com

Online: https://cbre.service-now.com/navpage.do (CBRE Employees only)

Axis Portal Online Help

Axis Portal provides help online and can be accessed at:
http://help.axisportal.com/tenanthandbook/tenanthandbook.aspx?type=0

Table of Contents

About Preventive Maintenance

When maintenance is required for equipment, a work order provides maintenance staff with information on the required task such as where the equipment is located and when the task is due. When a work order is dispatched, the maintenance staff can view the work order on their handheld device, perform the necessary work, and send the completed information back to the Preventive Maintenance (PM) work order system.

Get Started Now

To learn more about using the PM work order system and how it is used, please refer to the additional topics in *Using Preventive Maintenance* (p.64).

Not Set Up Yet?

For assistance setting up the PM work order system, including creating equipment, tasks and maintenance schedules, please refer to *Setting Up Preventive Maintenance* (p. 2).

Setting Up Preventive Maintenance

Equipment

About Equipment

Equipment that users wish to schedule work orders for must be added to the Equipment list. Maintenance tasks that have been added to the Task Library list can then be associated with equipment to create schedules. Work orders are automatically generated from the schedules that are set up for each piece of equipment.

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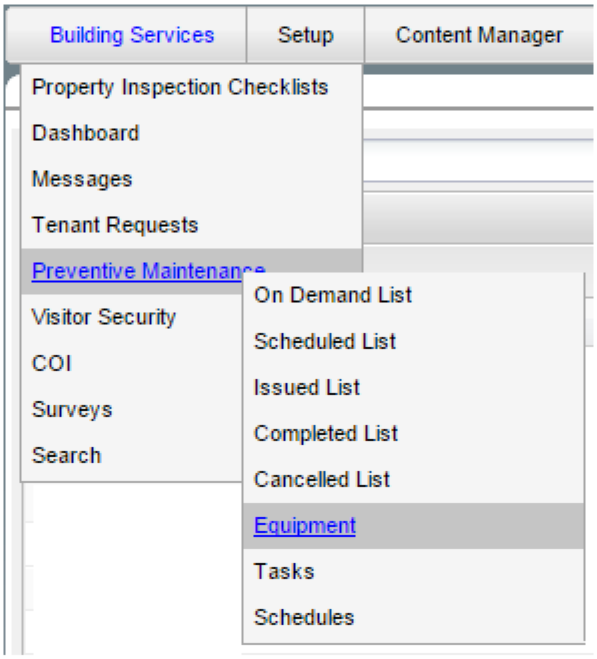
- It is necessary to enter equipment *before* setting up schedules.
- Tasks are created independently from schedules.
- When adding new equipment, enter descriptive names and/or number pieces of equipment when there are several of the same type (e.g. AHU#1, AHU#2).
- It is not necessary to enter all of the information regarding the equipment at first. Only the name, system, and floor need to be added during setup; additional information can be provided later.

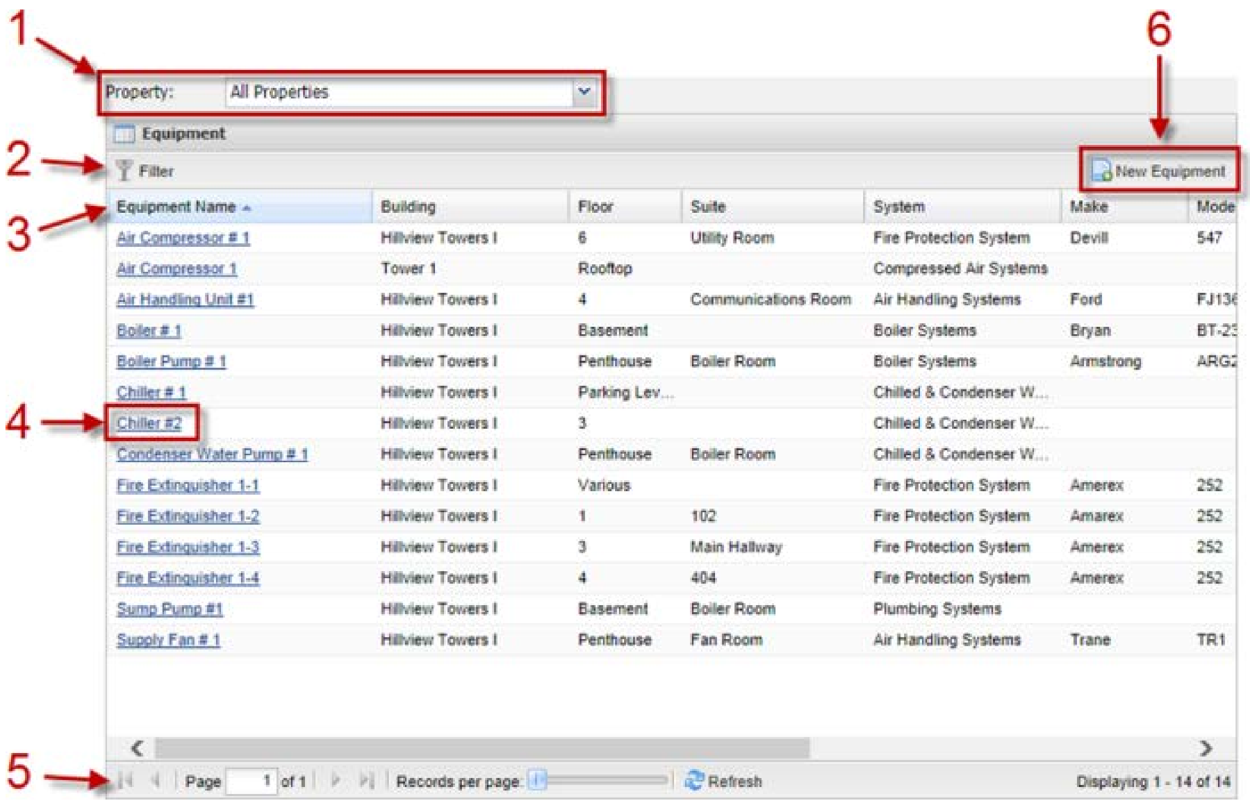
The Equipment List

This list displays basic information about equipment that has been entered into the PM work order system. From this list, users can also access the Equipment Details Screen and update schedules, gauge readings, file attachments, and other information.

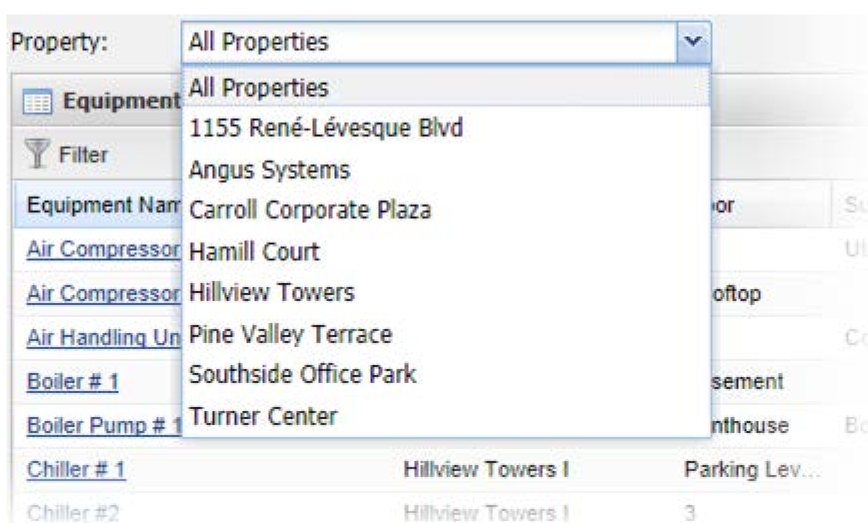
To access the Equipment list, log into the Axis Control Panel at http://cp.axisportal.com, hover over **Building Services**, hover over **Preventive Maintenance**, and click on **Equipment**.



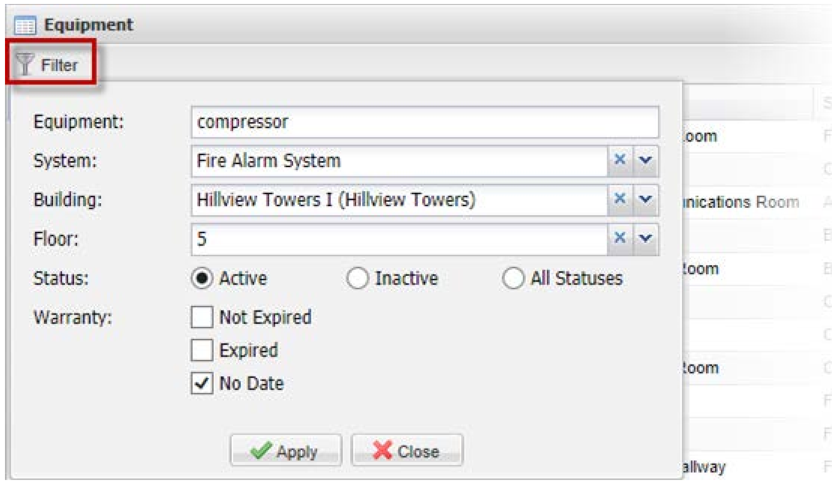
An overview of the various sections in the Equipment list are provided below.



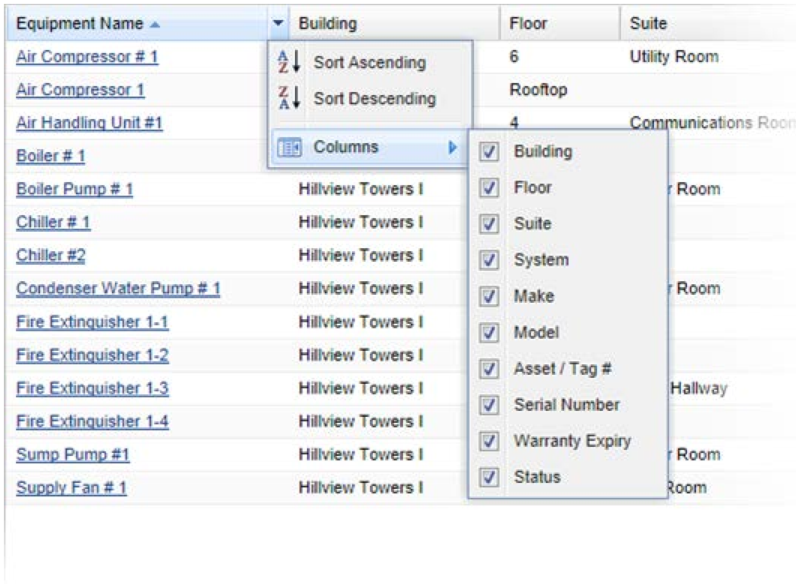
1. Use the **Property** drop-down to filter the list by property.



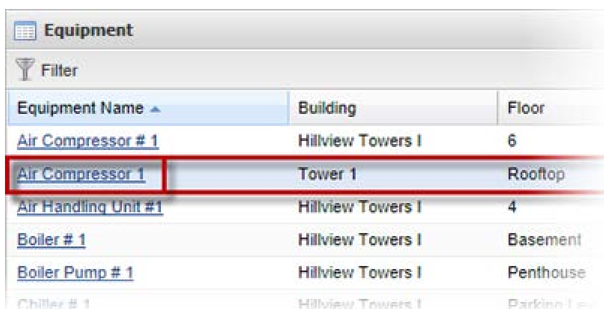
2. The **Filter** button opens an interface, which allows users to choose a wide variety of filtering options.
   - Filtering information is stored locally on your web browser, and is remembered between sessions. The filter is automatically reset if users change properties using the Property drop-down list mentioned in (1) above.



3. The list headings are highly customizable. All list customizations for a specific user are remembered between sessions and are stored locally on your web browser.
    - Users can click on a list heading to toggle between sorting the list in ascending or descending order.
    - Click and drag on headings to change the order they are displayed in.
    - Users can add or remove list headings by doing the following:
        - Click on the right side of a column heading (near the border between column headings, as shown in the image on the right).
        - Move your mouse pointer to the **Columns** entry in the list to display all available column headings.
        - Select the column headings that are preferred to be displayed and/or deselect the headings that are preferred to be hidden.



4. Clicking on an equipment name or double-clicking on a row in the list will display the Equipment Details page for that piece of equipment. See *The Equipment Details Screen* (p. 8) for additional details.



5. At the bottom of the list is a control toolbar that allows users to access several commonly used display features.

The following list controls are available:

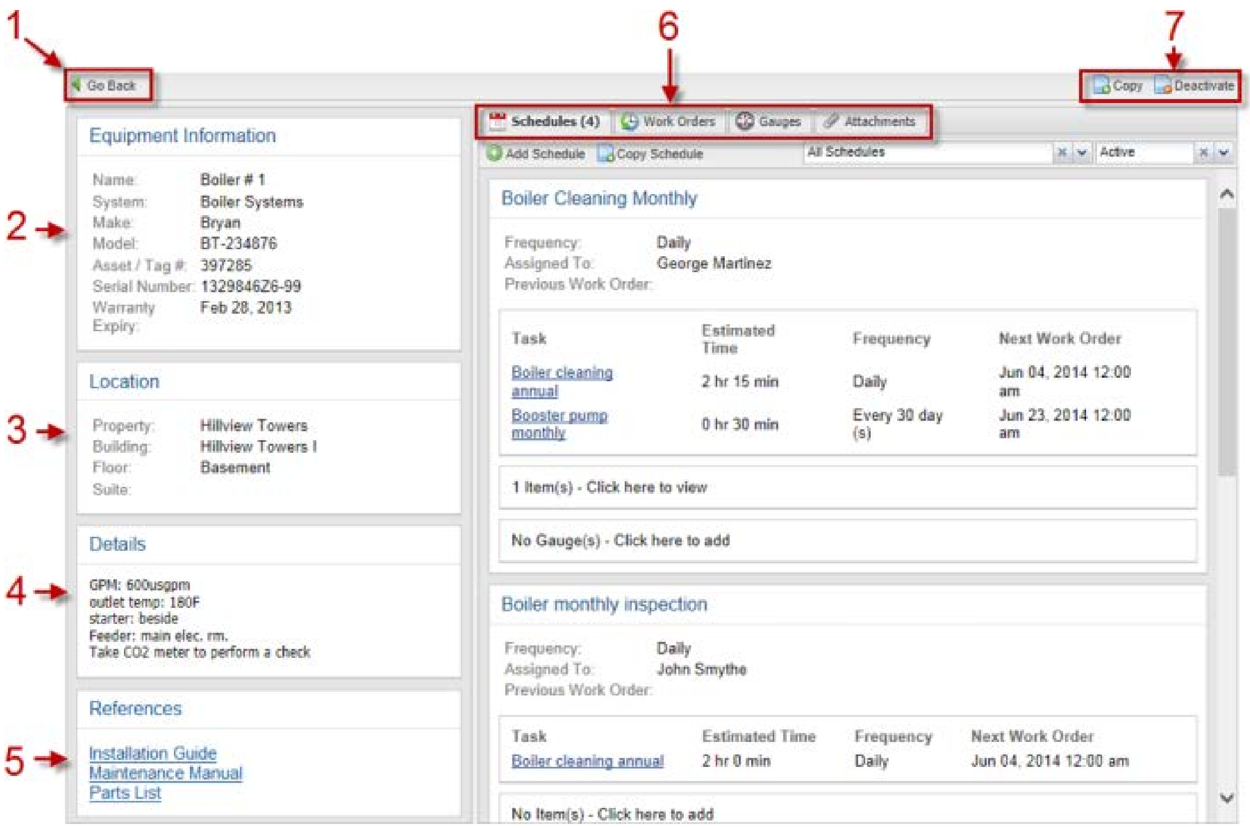
	Return to the first page of the list.
	Go to the previous page.
	Manually enter a specific page to go to.
	Go to the next page.
	Go to the last page.
	Use the slider to adjust the number of records displayed per page.
	Reload the list (checks for updates to the list since it was last loaded).
	Reset the list display settings to default (also removes any previously applied filters).

6. Click **New Equipment** to create a new entry in the Equipment list. See *Adding Equipment* (p. 13) for additional information.

The Equipment Details Screen

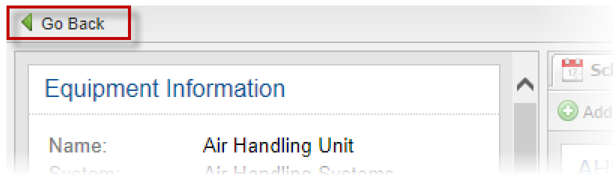
The Equipment Details screen is accessed by clicking on the name of an equipment record in the Equipment list. The Equipment Details screen allows users to view all information related to a piece of equipment, including:

- Basic information such as serial number, make and model.
- Equipment location.
- Additional details related to the operation of the equipment, including online references.
- All maintenance schedules associated with the equipment.
- A history of all work orders associated with the equipment.
- Gauges and gauge readings.
- Any other file attachments associated with the equipment.

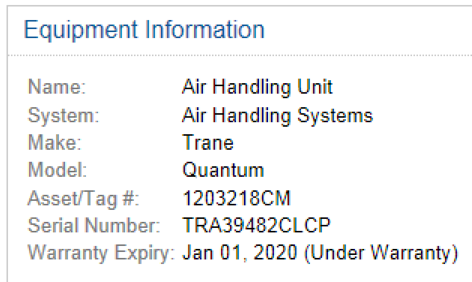


Basic, commonly referenced information is displayed as a series of virtual cards on the left side of the work order details; users can edit equipment by clicking on these cards. For additional details on editing this information, see *Editing Equipment* (p. 15).

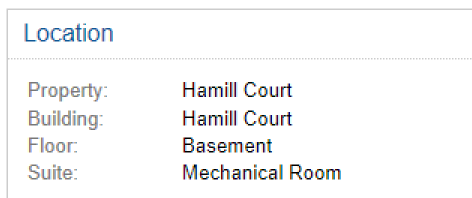
1. The **Go Back** button returns to the previous screen.



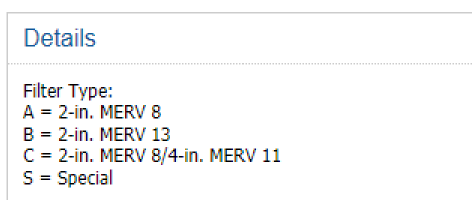
2. The Equipment Information card displays general information concerning the equipment: Name, System, Make, Model, Asset/Tag #, Serial Number, and Warranty Expiry.



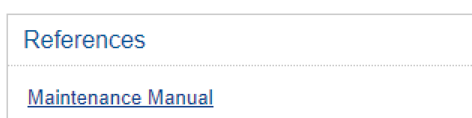
3. The Location card indicates the location where the equipment resides: Property, Building, Floor, and Suite.



4. The Details card displays additional notes concerning the physical description, layout, or equipment specifications, which could not be conveyed using the standard fields provided in the Equipment Information card.

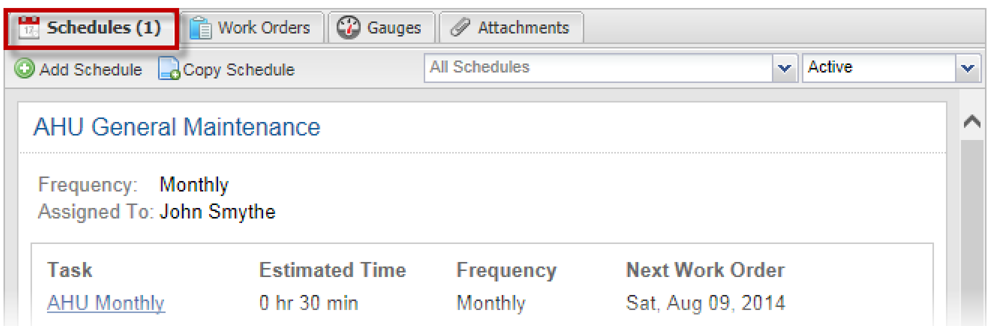


5. The References card contains external links (hyperlinks/URLs) related to the equipment, such as installation guides or maintenance manuals.

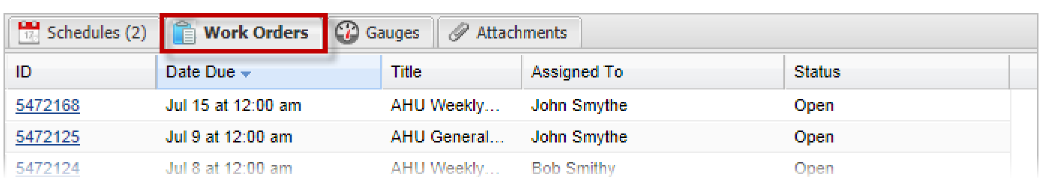


6. The Schedules, Work Orders, Gauges, and Attachments tabs are detailed below.
    - The Schedules tab displays all scheduled tasks associated with the equipment.

- The **Add Schedule** button allows users to create a new work order schedule. See *Adding a Schedule* (p. 19) for more details.
- Users can copy a schedule between pieces of equipment on the same property. See *Copying a Schedule* (p. 28) for more details.
- Users can use the drop-down menus on the right to filter the list of schedules by schedule name, or by status (Active, Inactive, All Statuses).
- Users can preview the work orders that will be generated by this schedule over the next 12 months by clicking the **Preview** link, located next to the Frequency field for the schedule's base task. See *Previewing a Schedule* (p. 30) for more details.
- Users can edit a schedule by clicking on the schedule. See *Editing a Schedule* (p. 21) for more details.
- Users can also deactivate (or reactivate previously deactivated) schedules. For additional information, see *Deactivating a Schedule* (p. 31) and *Reactivating a Schedule* (p. 33).

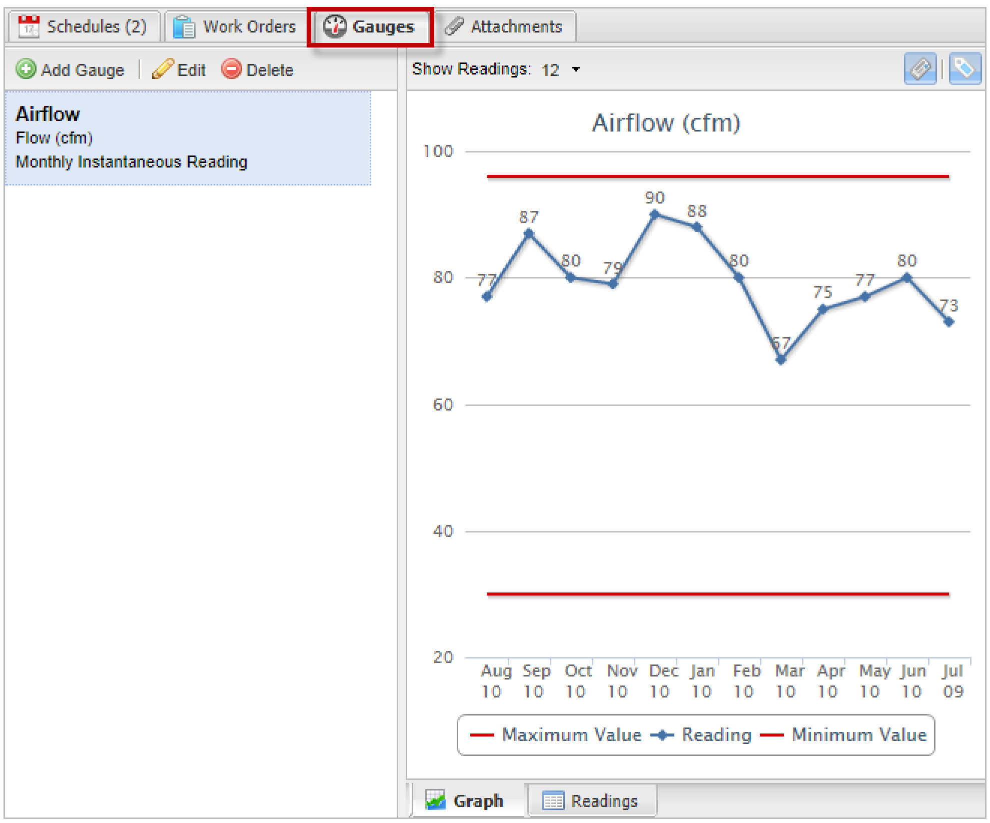


- The Work Orders tab displays a history of generated work orders and their status.
    - Click on an ID number to display the work order's details.

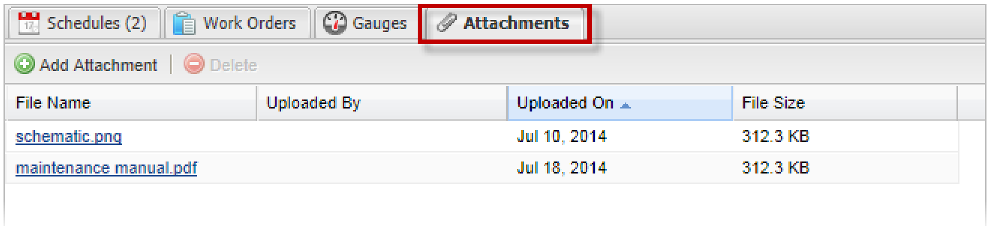


- The Gauges tab shows collected gauge data (if one or more gauges are associated with the equipment).
    - On the left side, click on a gauge to display its readings on the right.
        - Hover your mouse over the graph to view detailed information concerning the plot lines on the graph.

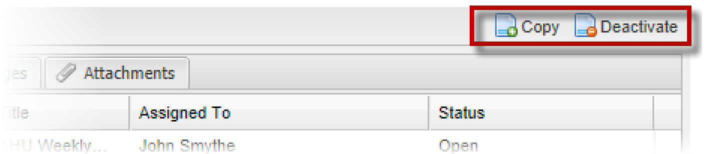
- The Show Readings drop-down list allows users to select the number of recent readings to display.
- The **Show/Hide Marker** button ( ) can be used to show or hide the graph's plot points.
- The **Show/Hide Label** button ( ) can be used to show or hide the numbers displayed on the graph line.
- The Graph tab at the bottom of the screen (selected by default) displays a graph of the gauge readings.
- The Readings tab (to the right of the Graph tab) displays a list of all gauge readings taken. Users can add, edit, or delete gauge readings; see *The Gauges Tab* (p. 34) for additional details.



- The Attachments tab displays a list of any files (such as MS Word documents, pictures, or PDF files). Users can view, add, and delete attachments in this interface. For additional details, see *The Attachments Tab* (p. 39).



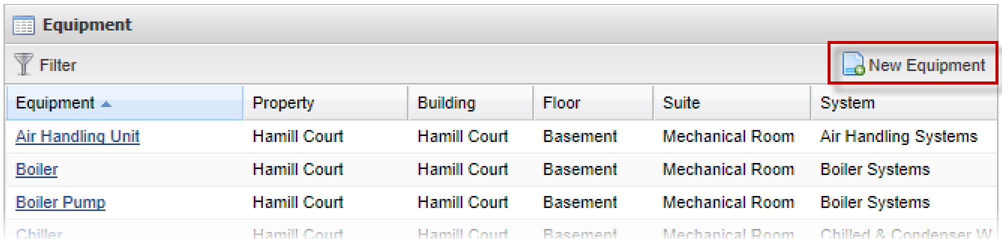
7. The **Copy** and **Deactivate** buttons located at the top-right provide the following functions:



- The **Copy** button allows users to create a copy of the equipment currently displayed. This is particularly useful when users have identical or very similar pieces of equipment to enter in the Equipment list.
- The **Deactivate** button can be used to indicate that the equipment is no longer in use. Deactivation preserves the work order history for the equipment and prevents new work orders from being generated for it. Deactivated equipment will instead display an **Activate** button, which can be used to reactivate the equipment. For additional details, see *Deactivating Equipment* (p. 17) and *Reactivating Equipment* (p. 18).

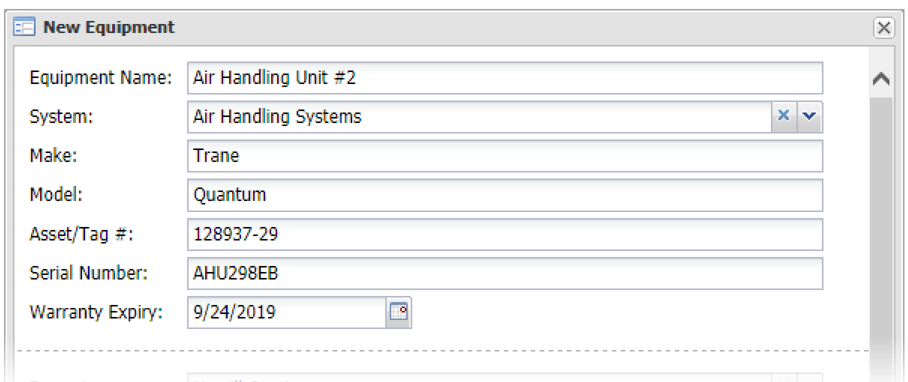
Adding Equipment

1. From the Equipment list, click **New Equipment** to create a new entry.



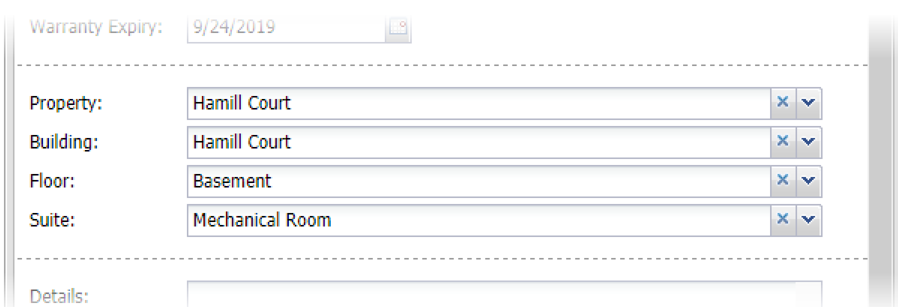
2. In the first section of the New Equipment window, users can provide the following information: Equipment Name, System, Make, Model, Asset/Tag #, Serial Number, and Warranty Expiry.

   - The Equipment Name and System fields are required fields; additional information can be provided at a later date.



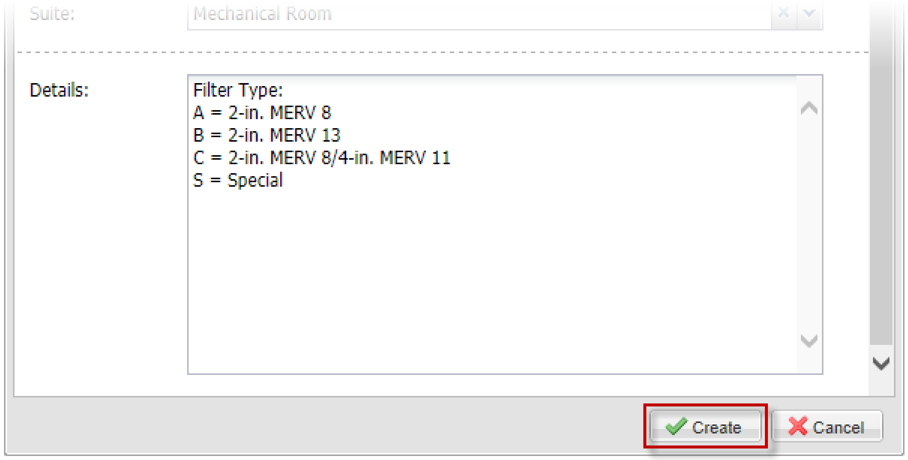
3. In the next section, enter the location where the equipment resides: Property, Building, Floor, and Suite.

   - The Property, Building, and Floor fields are required fields. Suite location (if relevant) can be provided at a later date.



4. In the last section, enter any important notes concerning the equipment in the Details field, then click **Create** to add the equipment.

- The Details field is not a required field.



5. Users are taken directly to the Equipment Details screen. The information provided on the previous screen is located in editable cards to the left; users can click on any of these cards to edit them, if permitted through Role Security.

    - The References card to the bottom-left also allows users to add references (external links/URLs) to any online resources that may be available for the equipment.

    - The Schedules, Work Orders, Gauges, and Attachment tabs allow users to do the following:

        - Add, edit, and deactivate work order schedules.

        - View a list of completed work orders related to the equipment.

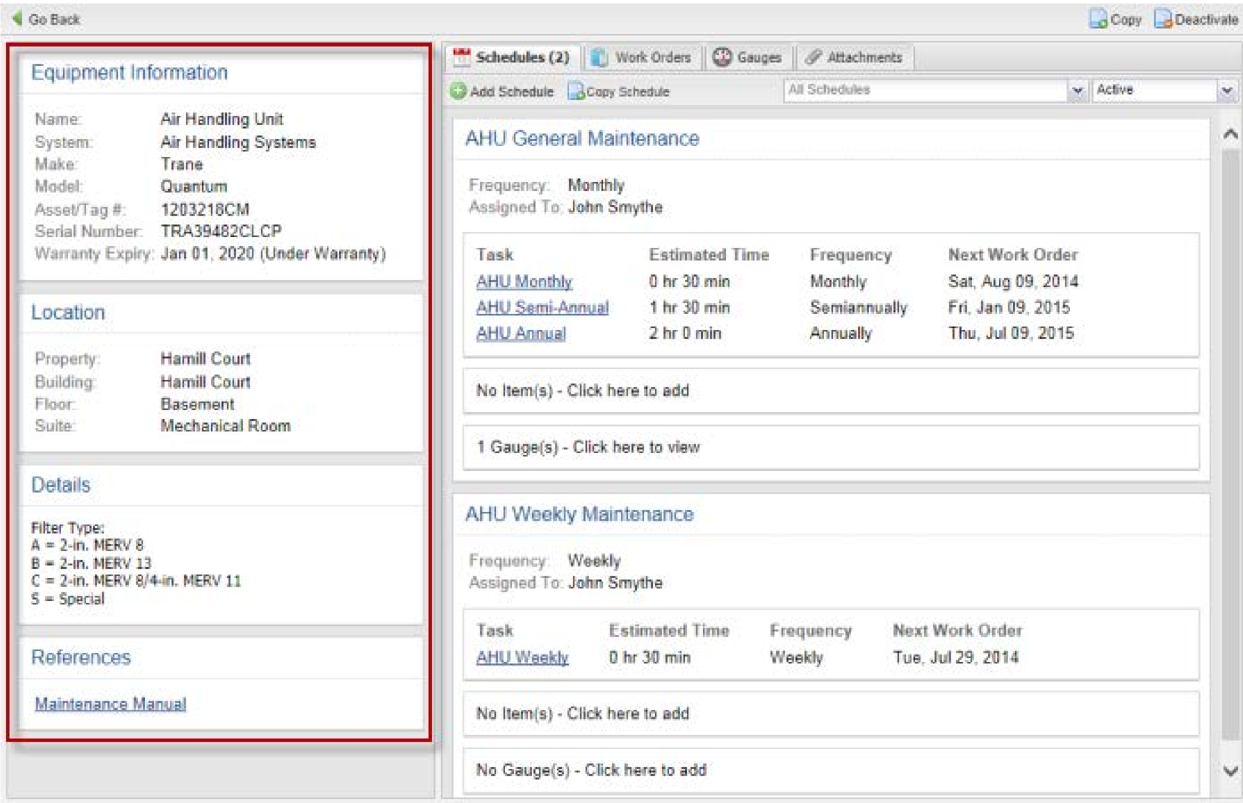
        - Add, edit, or view gauges and gauge readings.

        - Add, edit, or remove file attachments associated with the equipment (these attachments will also be appended to scheduled work orders).

        - For a general overview of the equipment details screen, see *The Equipment Details Screen* (p. 8).

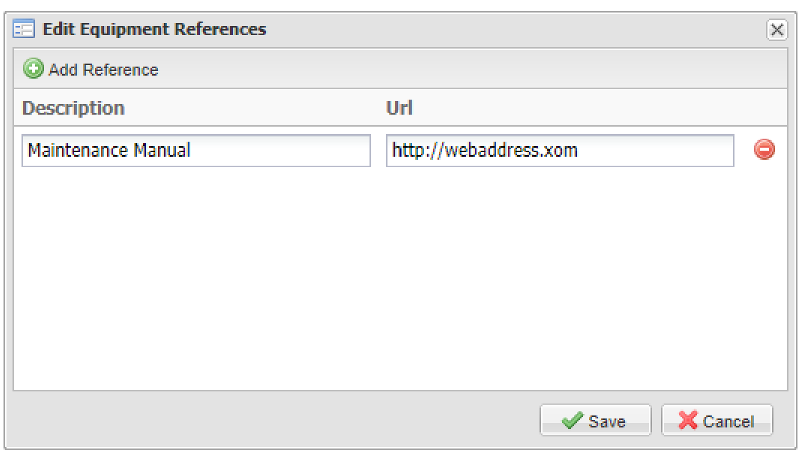
Editing Equipment

Users can edit basic equipment information from the Equipment Details screen. The Equipment Details screen is accessed by clicking on the name of an equipment record in the Equipment list.



To edit the Equipment, Location, Details, or References card:

1. Click on the desired card that needs to be updated. A popup window will open, allowing users to edit the information (in the example shown below, the Edit Equipment References window is shown).



2. Edit the information displayed in the window, then click **Save**.
    - In the Equipment References window, users can:
        - Add a reference by clicking **Add Reference**, then filling in a description for the link (this text appears in the References card) and entering the URL that the description should link to.
        - Delete a reference by clicking on the associated **Delete** button ().

On the right side of the Equipment Details screen is a tabbed interface (Schedules, Work Orders, Gauges, and Attachments). Users can view or edit the following information under these tabs:

- The Schedules tab allows users to add, edit, or delete work order schedules associated with the equipment. See the following related topics for additional details:
    - *Adding a Schedule* (p. 19)
    - *Editing a Schedule* (p. 21)
    - *Deactivating a Schedule* (p. 31)
- The Work Orders tab allows users to view a list of work orders generated by the equipment's schedules. Users can click on a work order ID to view the work order's details. See *Work Order Details Overview* (p. 74) for additional information.
- Under the Gauges tab, users can add, edit, and delete gauges associated with the equipment. Users can also view and edit gauge readings. See *The Gauges Tab* (p. 34) for additional details.
- The Attachments tab displays any files which have been attached to the equipment. Users can upload, download, and delete attached files. For more information, see *The Attachments Tab* (p. 39).
- Users can also Deactivate or Reactivate equipment which was previously set to Inactive. For additional details, see *Deactivating Equipment* (p. 17) and *Reactivating Equipment* (p. 18).

Deactivating Equipment

Equipment that is no longer in use, or is temporarily unavailable (due to extensive repairs and/or temporary removal from the property), can be deactivated. Users can also reactivate equipment that was previously deactivated.

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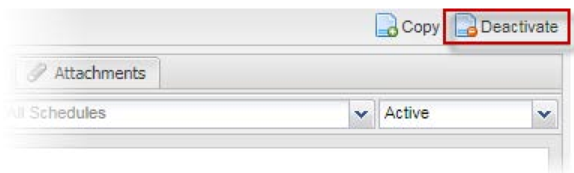
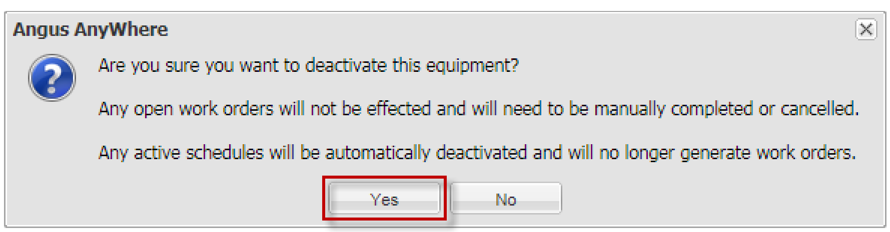
- In order to preserve work order histories, equipment cannot be deleted, only deactivated.
- If equipment is replaced, create a new equipment entry on the Equipment list instead of editing the original equipment, as this will cause issues with the original equipment's work order history.
- Deactivated equipment will also deactivate any schedules associated with it; work orders which have already been issued by these schedules will have to be manually completed or cancelled.

1. Locate the equipment that needs to be deactivated in the Equipment list. Once located, click on the equipment's name to view the equipment's details.
2. From the Equipment Details screen, click **Deactivate**, located at the top-right corner.



3. In the confirmation window that opens, click **Yes** to complete deactivation of the equipment. Please note that the equipment's schedules will also be deactivated; however, any work orders already issued by these schedules will have to be manually completed or cancelled.

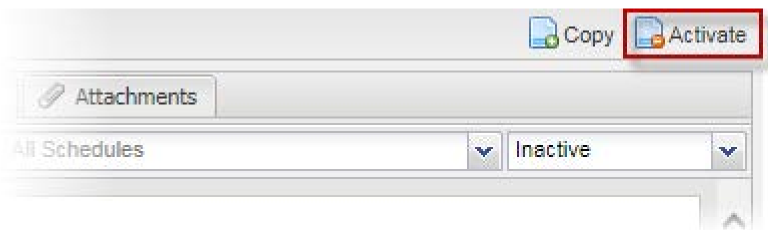


Reactivating Equipment

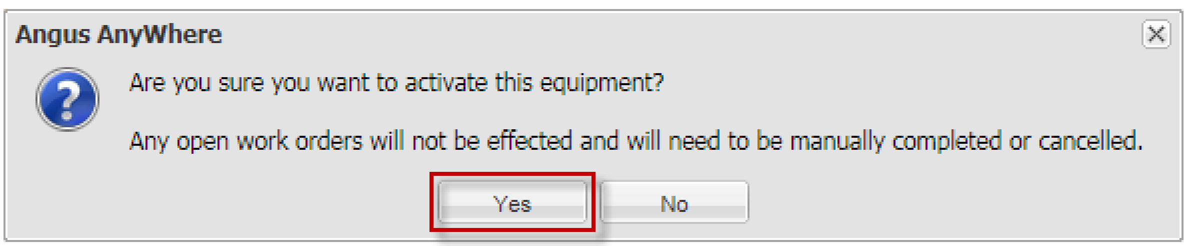
Equipment that was deactivated in error, or was only temporarily unavailable (due to extensive repairs and/or temporary removal from the property), can be reactivated.

> **!** Reactivated equipment will still have all of their schedules set to Inactive. These schedules will need to be reactivated separately.

1. Locate the equipment that needs to be reactivated in the Equipment list. In order to view inactive equipment on the Equipment list, the list's filter settings will have to be set to display inactive equipment. Once located, click on the equipment's name to view the equipment's details.
2. From the Equipment Details screen, click **Activate**, located at the top-right corner.



3. In the confirmation window that opens, click **Yes** to complete reactivation of the equipment. Please note that the equipment's schedules will remain inactive and need to be reactivated separately.

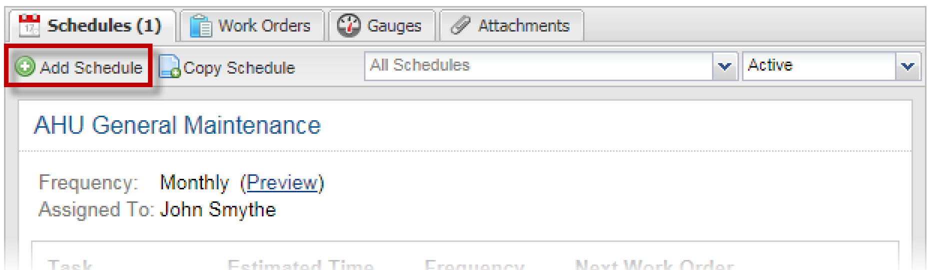


Schedules

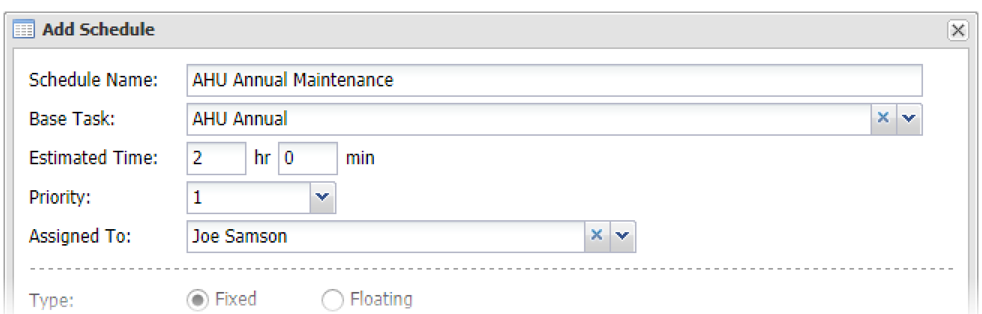
Adding a Schedule

Work order schedules can be added on the associated Equipment Details screen, under the Schedules tab. If users wish to create a schedule which uses multiple tasks (a multitask schedule), users must first create the schedule using a single task as a basis (referred to as the base task), then edit the schedule and add subtasks.

1. Under the Schedules tab, click **Add Schedule**.

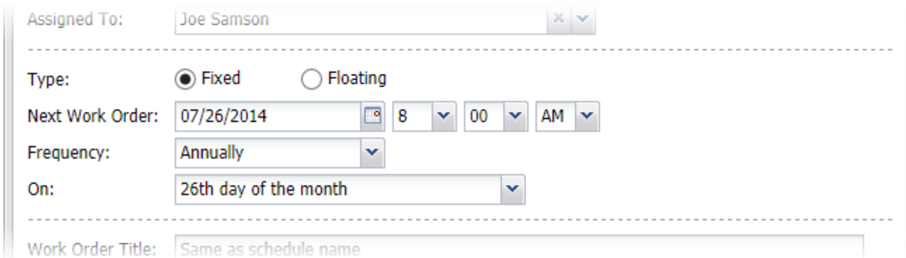


2. An Add Schedule window will open. In the first section, enter the following information:
    - The schedule name
    - The base task that the schedule will use
    - The estimated time to complete the task
    - The priority
    - Who the work order will be assigned to (this is not a required field)



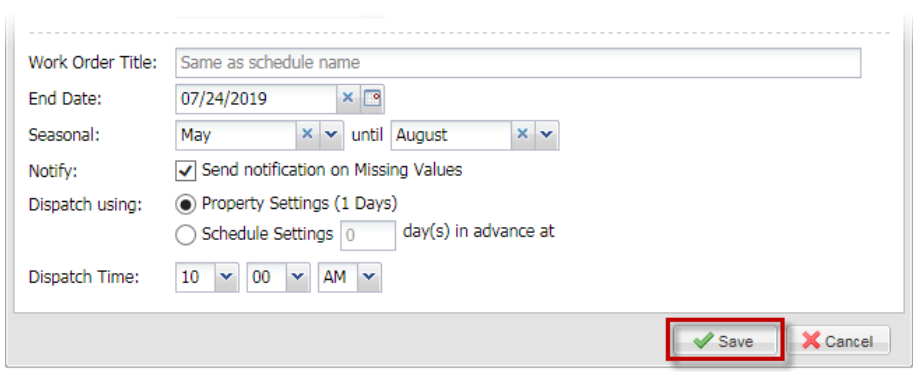
3. In the next section, enter the following scheduling information:
    - The work order Type
    - The date and time that the next work order should be scheduled for
    - The frequency (Daily, Weekly, Monthly, Quarterly, Semiannually, Annually, More Options)

- Users can use More Options to select a custom frequency, such as every 4 years, every 8 days, etc.
- If users select a frequency that is one month or longer, the **On** drop-down is displayed, allowing users to select the day or week of the month (e.g. 15th day of the month, 2nd Wednesday of the month, etc.)



4. In the last section, enter the following optional work order details:
    - A work order title (default is same as the schedule name).
    - An end date, after which the schedule will stop generating work orders.
    - Seasonal scheduling, where users can specify an interval of months in the year where the work orders should be scheduled. If this schedule is not seasonal, leave these fields blank.
    - Whether or not a notification should be sent if a work order is completed with missing values (checked by default).
    - Dispatch options (either the property's default dispatch options, or a custom number of days in advance).
    - Dispatch time.

> *i* If automatic dispatching is not enabled for the property, then dispatch options cannot be selected (all work orders must be manually dispatched). To set automatic dispatch options for a property, see *PM Work Order Dispatch Options* (p. 63).



5. Click **Save** once finished.

Editing a Schedule

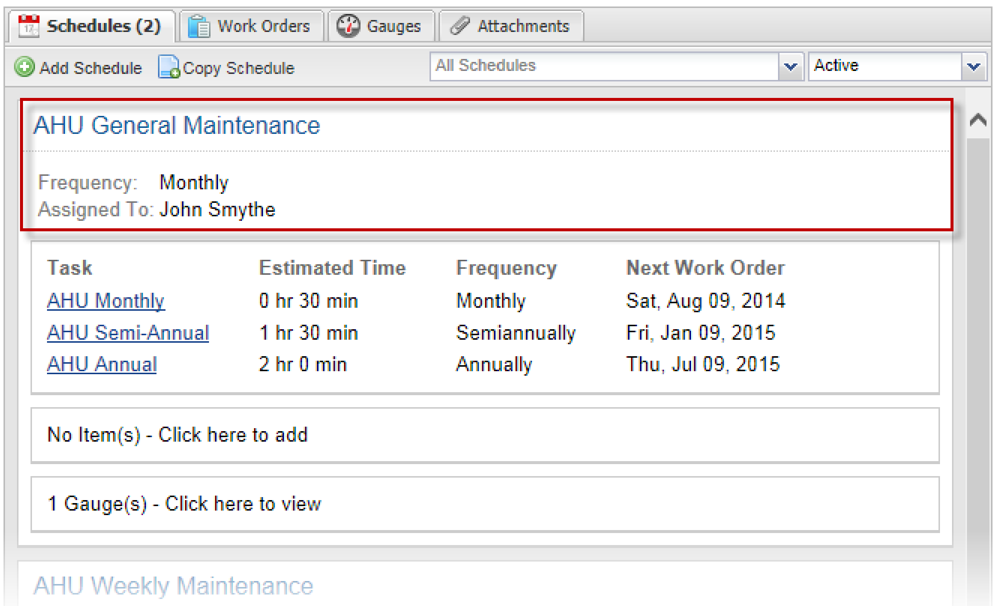
> **!** Changes to a schedule will not impact previously dispatched work orders, only future work orders.

Work order schedules can be edited on the associated Equipment Details screen, under the Schedules tab.

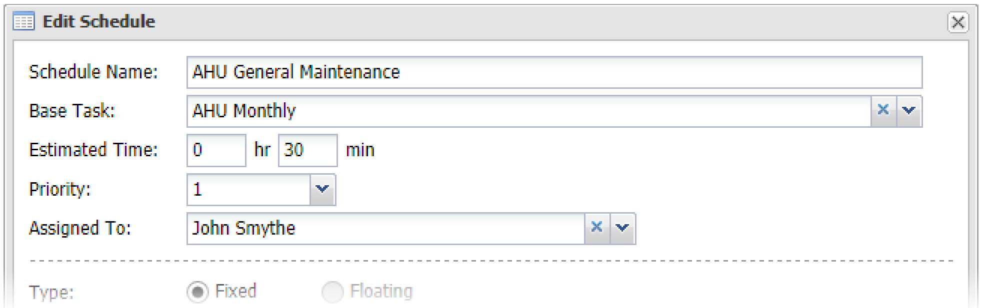
There are several editable subsections for each schedule.

Editing a Schedule's Base Task

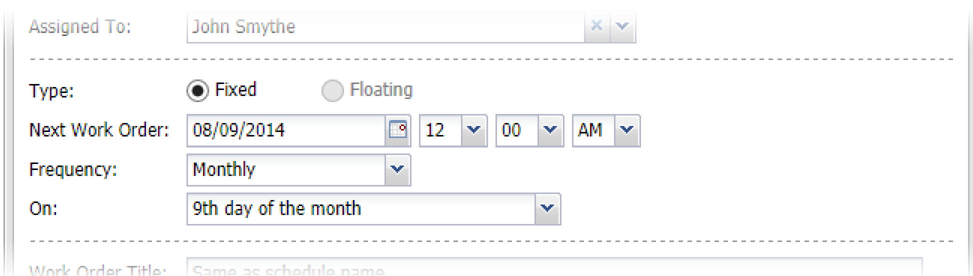
1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the top section of the schedule card.



2. An Edit Schedule window will open. In the first section, users can update the following information:
   - The schedule name
   - The base task that the schedule will use
   - The estimated time to complete the task
   - The priority
   - Who the work order will be assigned to (this is not a required field)

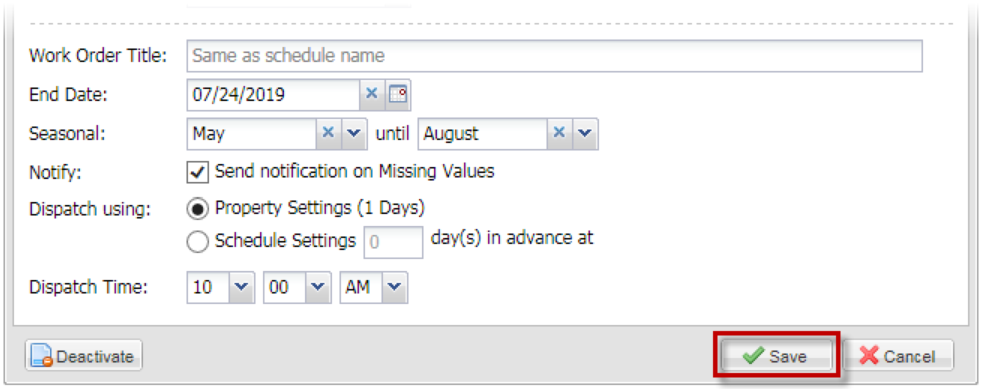


3. In the next section, users can modify the following scheduling information:
    - The date and time that the next work order should be due for completion
    - The frequency (Daily, Weekly, Monthly, Quarterly, Semiannually, Annually, More Options)
        - Users can use More Options to select a custom frequency, such as every 4 years, every 8 days, etc.
        - If users select a frequency that is one month or longer, the On drop-down is displayed, allowing users to select the day or week of the month (e.g. 15th day of the month, 2nd Wednesday of the month, etc.)



4. In the last section, users can edit the following optional work order details:
    - A work order title (default is same as the schedule name).
    - An end date, after which the schedule will stop generating work orders.
    - Seasonal scheduling, where users can specify an interval of months in the year where the work orders should be scheduled (outside of this interval, work orders will not be scheduled during the year). If this schedule is not seasonal, leave these fields blank.
    - Whether or not a notification should be sent if a work order is completed with missing values (checked by default).
    - Dispatch options (either the property's default dispatch options, or a custom number of days in advance).
    - Dispatch time.

i If automatic dispatching is not enabled for the property, then dispatch options cannot be selected (all work orders must be manually dispatched). Users will also see additional text in this section indicating that this is because automatic dispatching is turned off. To set automatic dispatch options for a property, see *PM Work Order Dispatch Options* (p. 63).

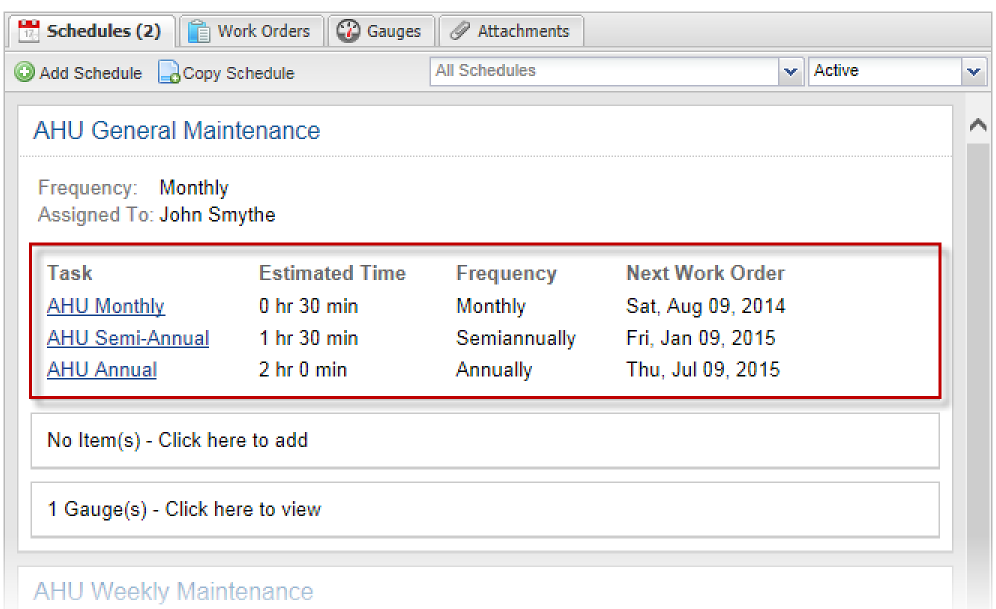


5. Click **Save** once finished.

Adding or Editing Subtasks (Multitask Schedules)

! Changes to subtasks will not affect previously dispatched work orders, only future work orders.

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Subtask section of the schedule card.

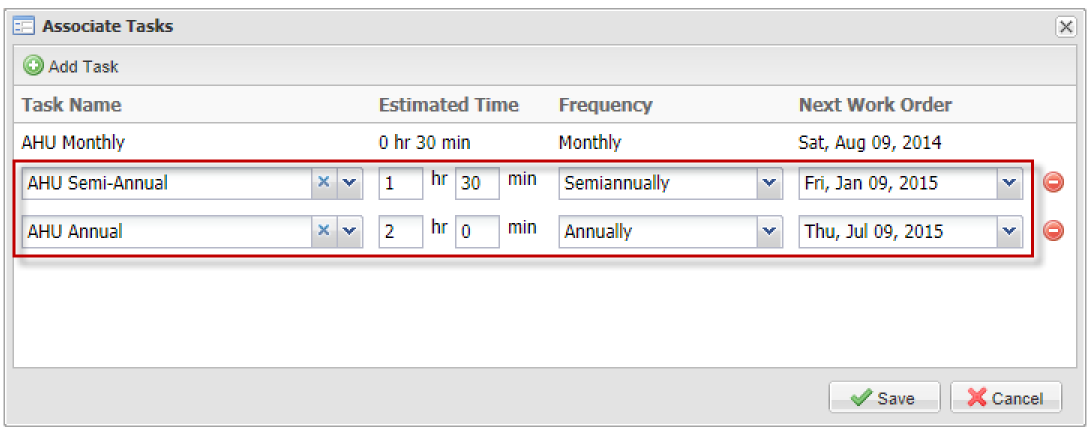


2. In the Associate Tasks window that opens, users can add, edit or remove subtasks.

- For reference, the base task is listed but must be edited from the schedule (see Editing a Schedule's Base Task, above).

3. Users can edit existing subtasks using the drop-down menus. The following details can be modified:

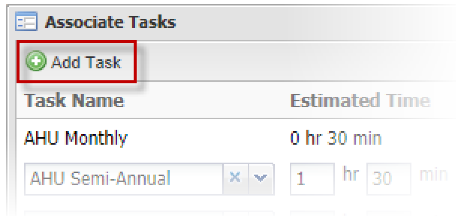
    - **Task name:** Users can select a different task to replace the current subtask.
    - **Estimated Time:** The default time is auto-filled when users add or change the subtask.
    - **Frequency:** It is important to note that the frequency of the subtask is based on the base task. In the example below, the base task is performed monthly; subtasks will have a minimum monthly frequency, so they can align with the base task's scheduling.
    - **Next Work Order:** The next date where this subtask will be included on work orders generated by this schedule. The Next Work Order drop-down provides options which are compatible with the subtask's frequency and the dispatch dates for the base task.



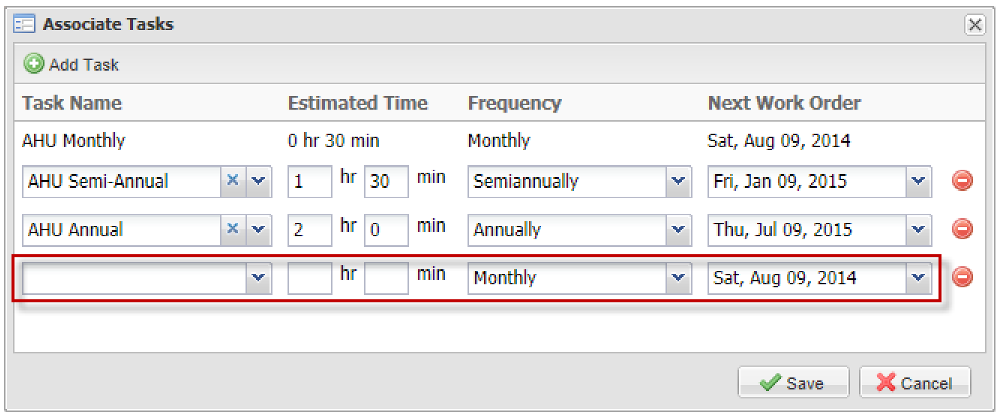
i A maximum of 5 tasks are permitted

4. Users can remove a subtask by clicking the associated **Delete** button ( ).
5. To add a subtask:

    - Click **Add Task**.



- A row is added in the associate tasks window, where users can select a new subtask. The same rules apply as when editing a subtask in (3) above.



6. Click **Save** once finished.

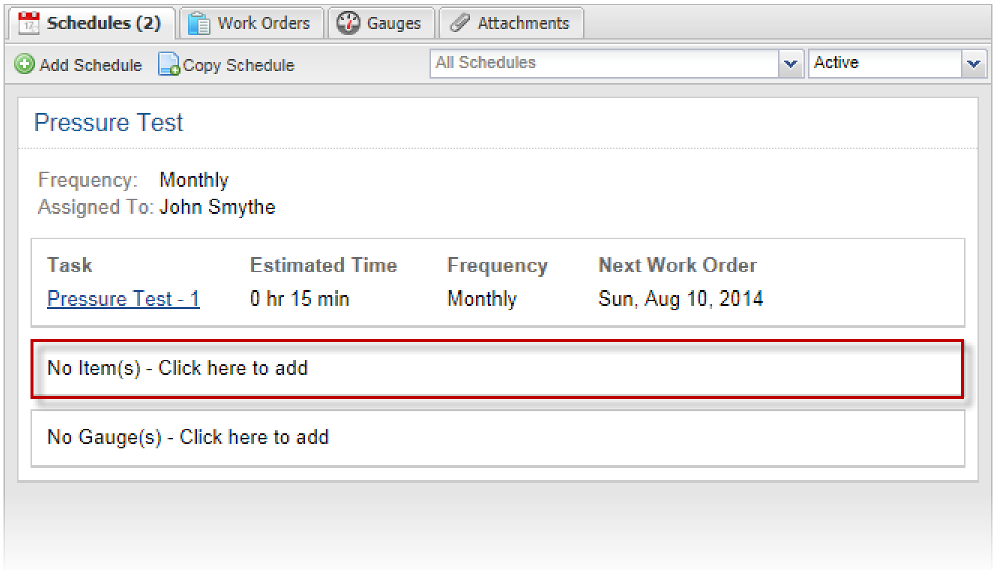
Adding or Editing Items

Items describe a collection of equipment items that must be attended to in a schedule. Each schedule can have a maximum of 99 Items. Items are useful in situations where identical work is performed on multiple pieces of equipment, such as fire extinguishers or fire alarms. Each item that appears in a work order generated from a PM schedule can be marked as Pass or Fail by the person completing the work order.

Items may be created, edited, or deleted from within a PM schedule. For each item, a space is provided to enter a description, location and type.

When creating Items, it is recommended that they be given meaningful names and descriptions in the fields provided. This makes it easier for an Engineer using a handheld device to locate the Item and thus facilitate the process of completing the specified task(s).

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Items section of the schedule card.



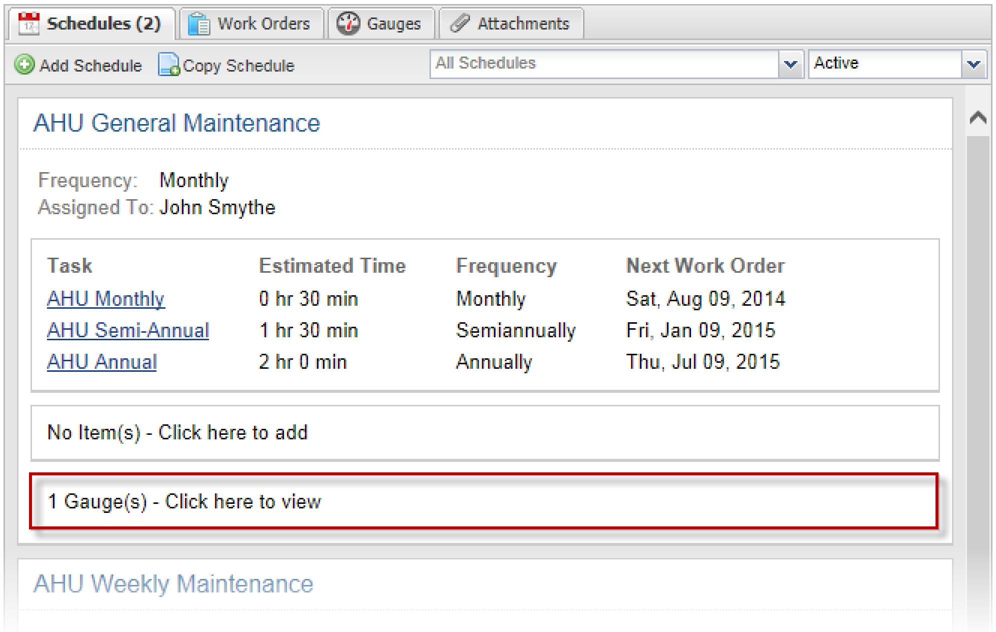
2. In the Edit Scheduled Items window, users can:
   - Add an item by clicking **Add Item**, then filling in the Description, Location and Type fields.
   - Edit an item by modifying the information in the Description, Location and Type fields.
   - Remove an item by clicking the associated **Delete** button ().

3. Click **Save** once finished.

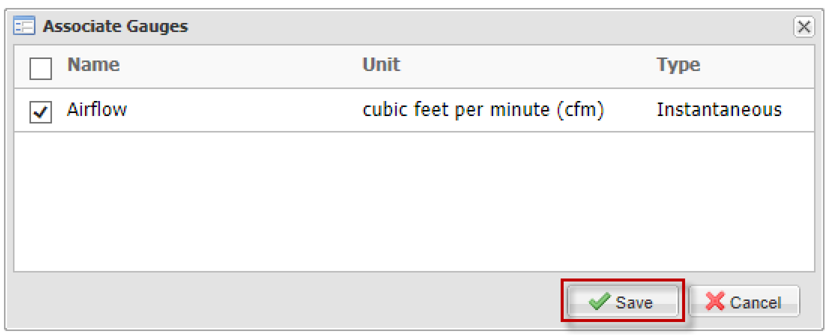
Adding or Editing Gauges in a Schedule

To add a gauge to a schedule, users must first add at least one gauge to the equipment under the Gauges tab.

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Gauges section of the schedule card.



2. In the Associate Gauges window that opens, a list of gauges that have been defined for the equipment under the Gauges tab are displayed.



3. Place a checkmark beside the gauges that readings should be taken for on this schedule (removing a checkmark beside a gauge will remove the gauge from the schedule).
4. Click **Save**.

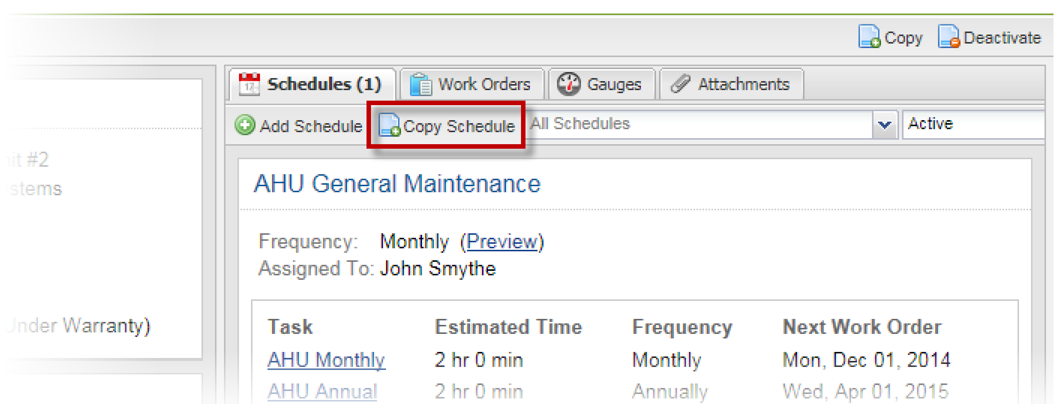
Copying a Schedule

It is common for buildings to have multiple installations of the same equipment type, either within the same building, or on another building that resides in the same property. In some cases, some maintenance schedules are sufficiently generic that they can be applied to more than one type of equipment.

To reduce the need for recreating maintenance schedules for similar or identical pieces of equipment, users can copy one or more schedules from one piece of equipment to another, as long as they both reside on the same property.

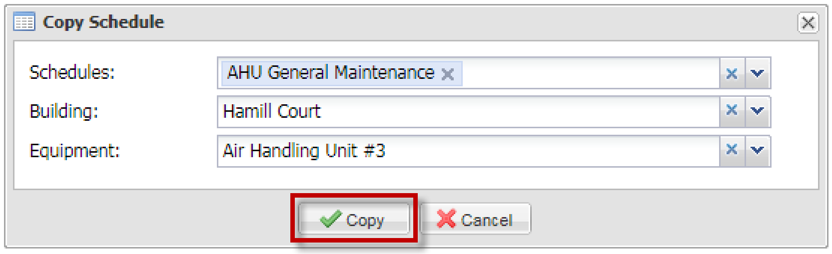
Follow the steps below to copy a schedule:

1. Locate the schedule. Users can do this in one of two ways:
    - By finding the equipment the schedule currently applies to and opening the equipment's details screen.
    - By finding the schedule on the Schedules list and opening the equipment's Details screen.
2. Once the equipment's Details screen is open, under the Schedules tab, click **Copy Schedule**.



3. A Copy Schedule window will open. Select the following options:
    - The name of the schedule that will be copied. Users can select more than one schedule as long as each one is associated with the same piece of equipment, by continuing to select items from the drop-down menu. Users can remove a selected schedule by clicking on the **X** icon beside it.
    - The building the schedule(s) will be copied to (only buildings on the same property can be selected).
    - The Equipment that the schedule(s) will be copied to.

Click **Copy** to copy the selected schedule(s).



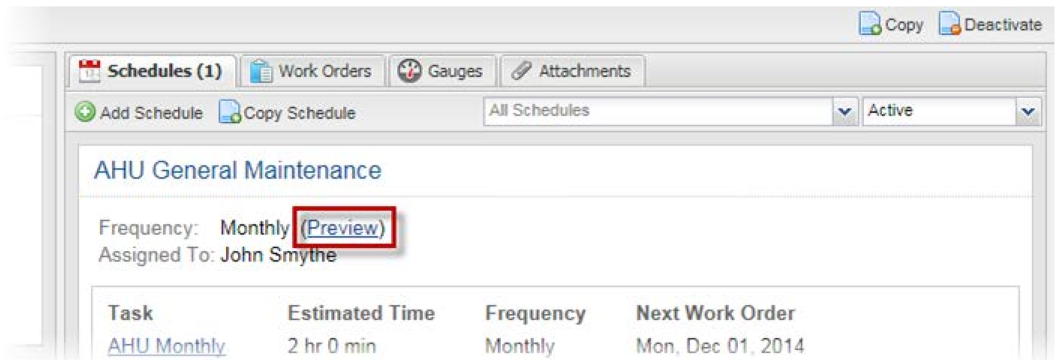
4. Users will then be taken to the details screen of the equipment that the schedules were copied over to, allowing users to edit the copied schedule(s) as needed.

Previewing a Schedule

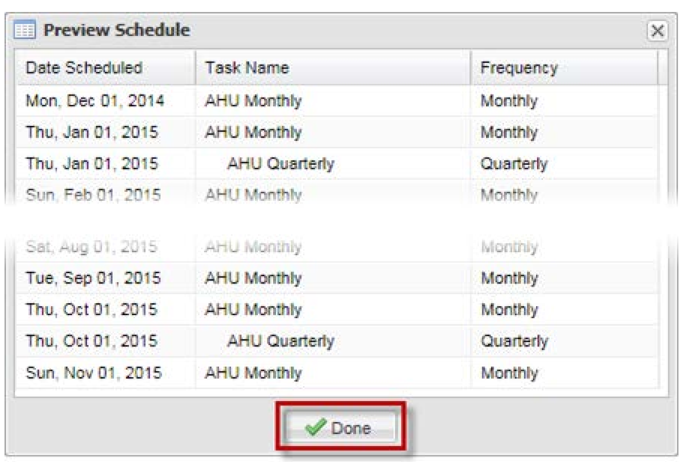
Users can view a list of upcoming work order dates for any schedule that they create. This is particularly useful for schedules that are comprised of multiple tasks which have different frequencies, for example, a schedule that incorporates monthly, quarterly and annual tasks can be previewed to ensure that the scheduling will occur as intended, or to identify potential scheduling issues which could be correcting by modifying the schedule.

To preview a schedule:

1. Locate the schedule under the associated equipment's details screen under the Schedules tab. If users are uncertain which piece of equipment the schedule is assigned to, users can locate the schedule by name in the Schedules list.
2. Click the **Preview** link, located beside the base task's Frequency field.



3. The Preview Schedule window opens, allowing users to view the work order schedule for the next 365 days. As shown below, indented task names are subtasks.

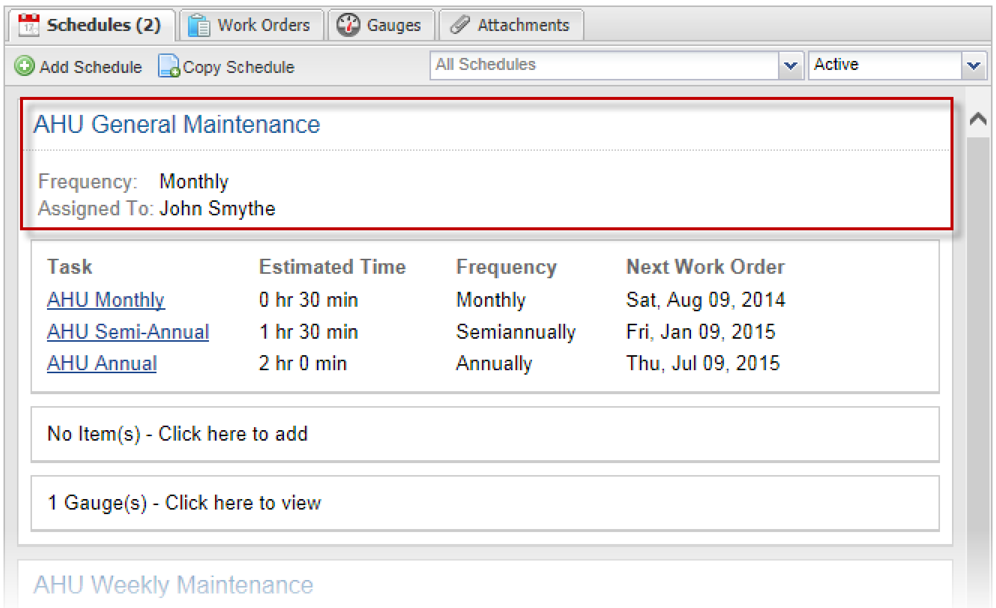


4. Click **Done** once finished.

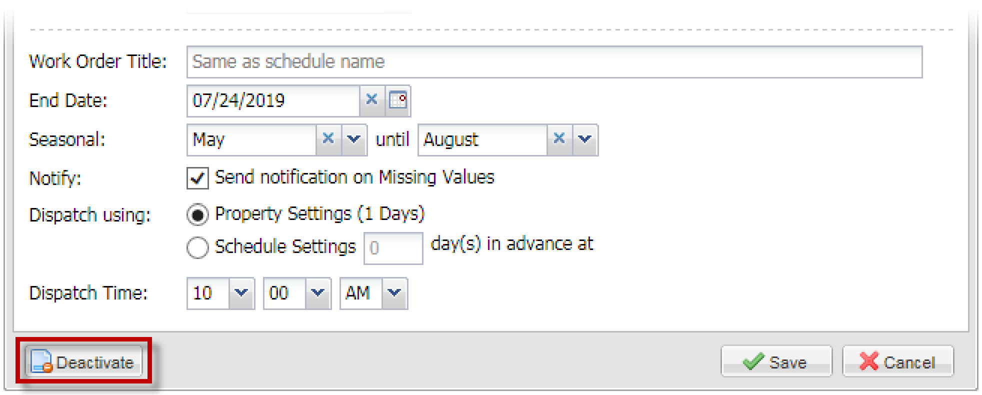
Deactivating a Schedule

Schedules that are no longer required can be deactivated. Inactive Schedules do not generate Work Orders. In order to preserve work order histories, schedules cannot be deleted. Users can also reactivate a previously deactivated schedule.

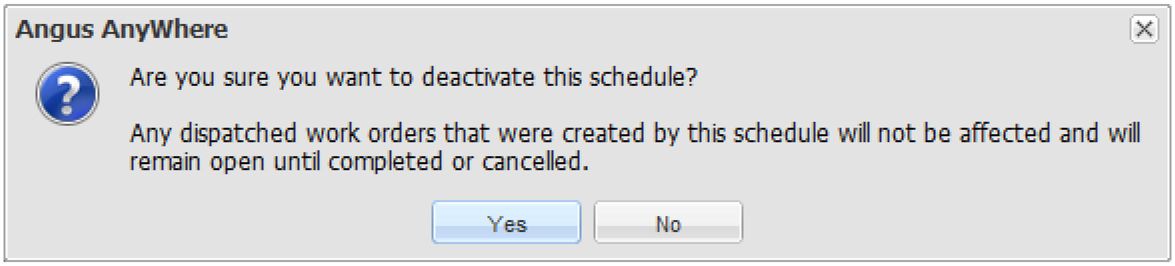
1. Under the Schedules tab, locate the schedule card that needs to be deactivated, then click on the top section of the schedule card.



2. An Edit Schedule window will open. At the bottom-left of this window, click **Deactivate**.



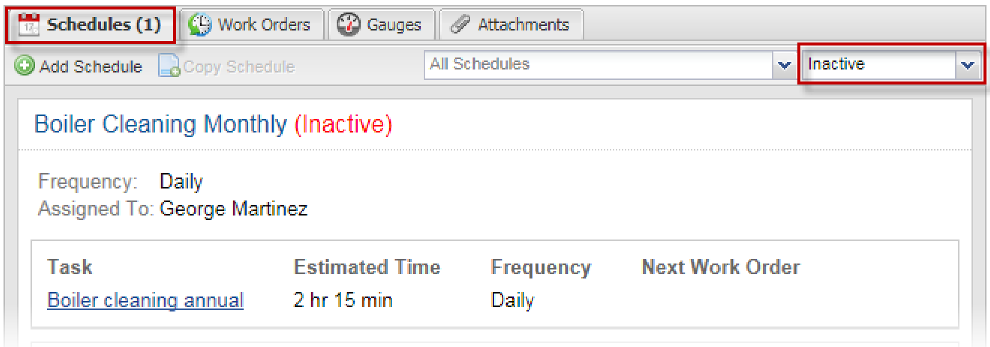
3. Click **Yes** to confirm deactivation. The schedule is now deactivated.



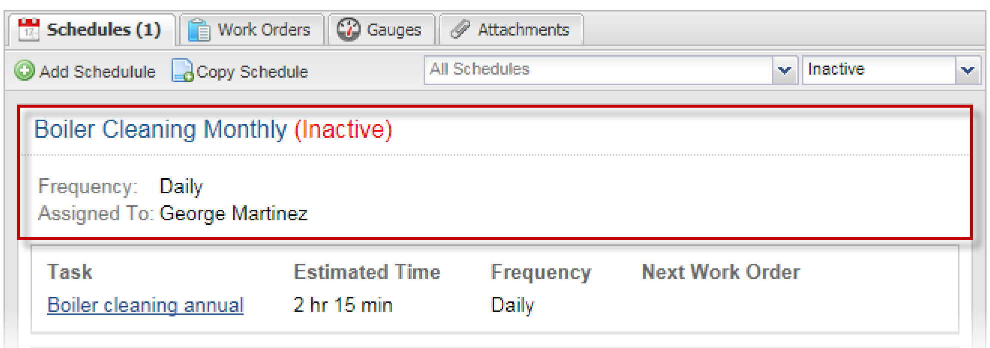
Reactivating a Schedule

If a schedule was deactivated in error, or if a previously deactivated schedule is needed, it is possible to reactivate the schedule. This allows the schedule to once again dispatch work orders.

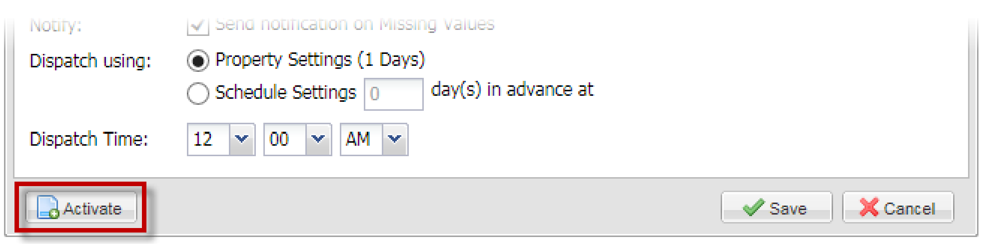
1. Schedules are reactivated from the equipment details screen. If not already viewing the equipment details, locate it in the Equipment list. To see deactivated schedules, in the Schedule tab's filter drop-down settings to display inactive schedules.



2. Once the schedule card that needs to be edited has been located, click on the top section of the schedule card.



3. An Edit Schedule window will open. At the bottom-left of this window, click **Activate**. The schedule is now reactivated.

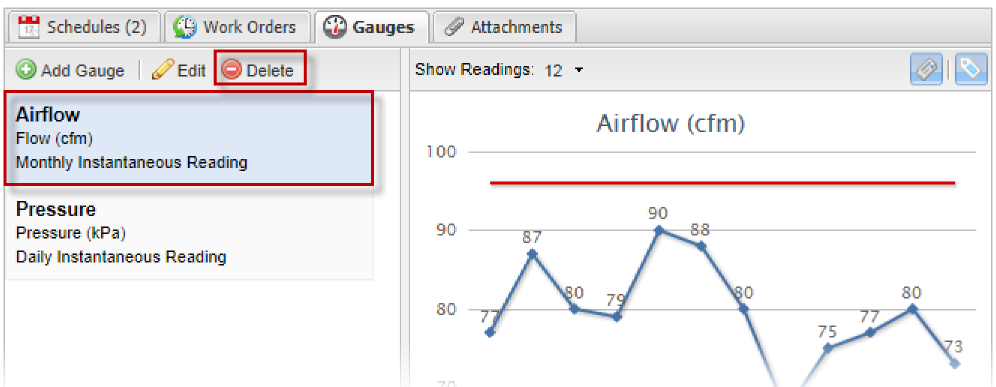


The Gauges Tab

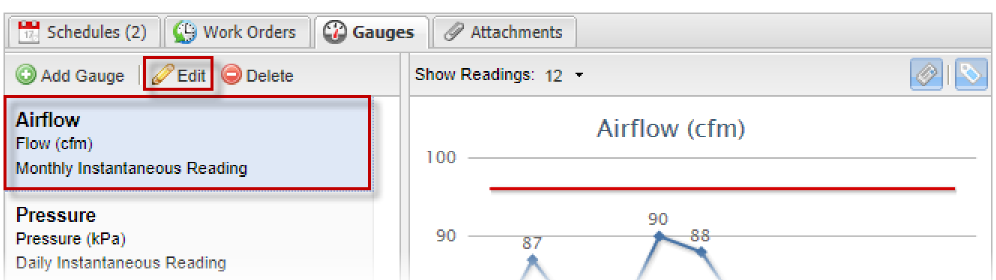
Gauges are associated with a specific piece of equipment and are displayed under the Gauges tab in the Equipment Details screen. A single piece of equipment can have up to fifty gauges defined for it. Once gauges have been configured, they can be added to any schedules associated with the equipment. This will create a Gauges section on all future work orders that are generated, allowing users to capture readings from the field. Users can also manually add or edit gauge readings in the Gauges tab.

Add, Edit or Delete a Gauge

- Users can delete a gauge by selecting a gauge, then clicking **Delete**. In the confirmation window that opens, click **OK**.

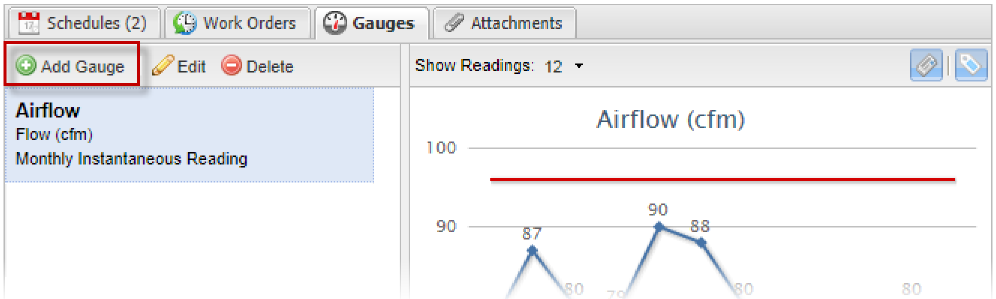


- Users can edit a gauge by selecting a gauge and clicking **Edit**. This will open an Edit Gauge window. Users can edit the gauge by following steps 2 and 3 below for adding a gauge.



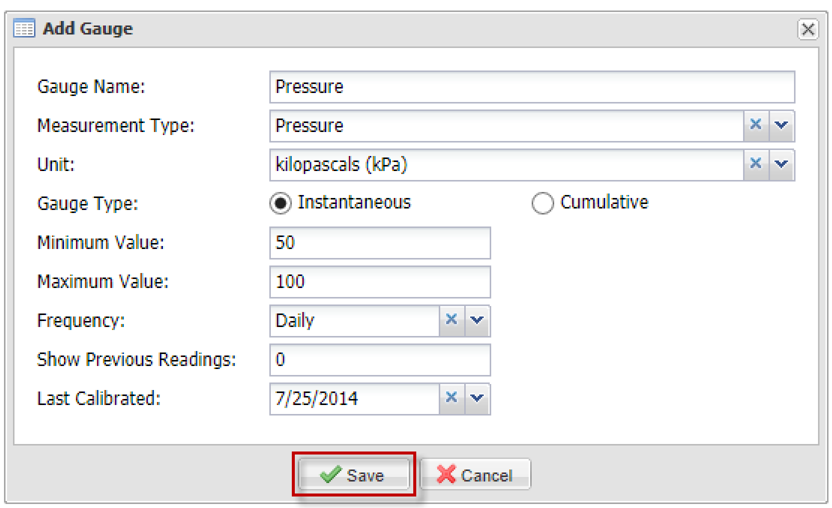
To add a gauge:

1. Click **Add Gauge**. This will open an Add Gauge window.



2. In the window that opens, enter the following information:

- **Gauge Name**
- **Measurement Type**: e.g. Pressure, Flow, Temperature, etc.
- **Unit**: A variety of appropriate units of measurement are provided based on the measurement type selected.
- **Gauge Type**: Instantaneous or Cumulative can be selected.
- **Minimum Value** and **Maximum Value**: These optional fields allow users to select a maximum and minimum acceptable value.
- **Frequency**: How often gauge readings should be taken.
- **Last Calibrated**: This optional field allows users to indicate when the gauge was last calibrated.

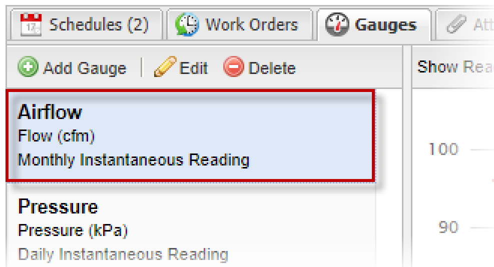


3. Click **Save** once finished.

Graphing Gauge Readings

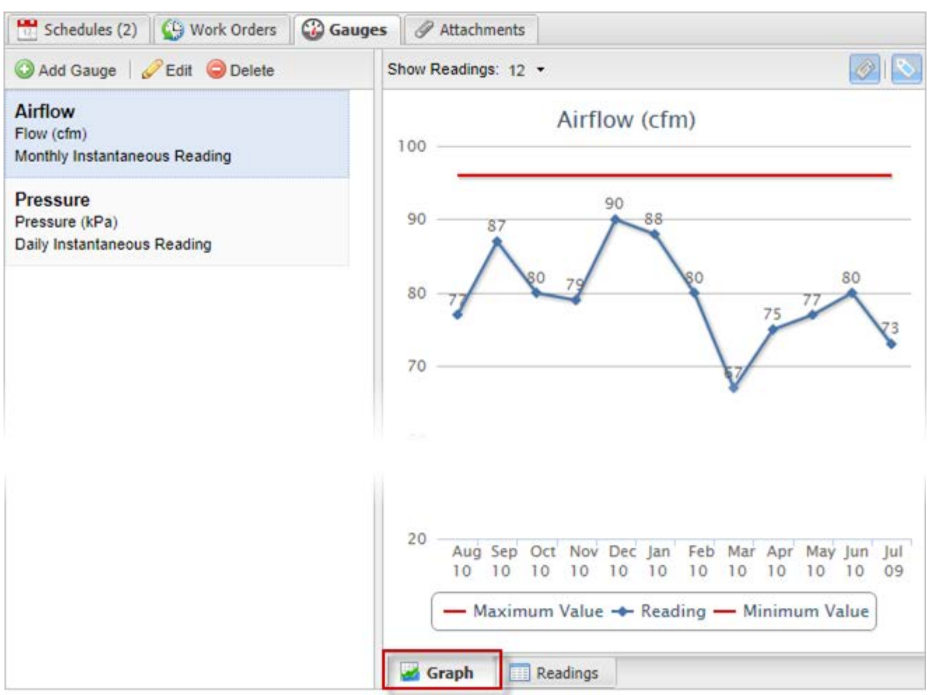
Any gauge that has had readings entered for it can be viewed as a graph:

1. Select the Gauge to be viewed as a graph.



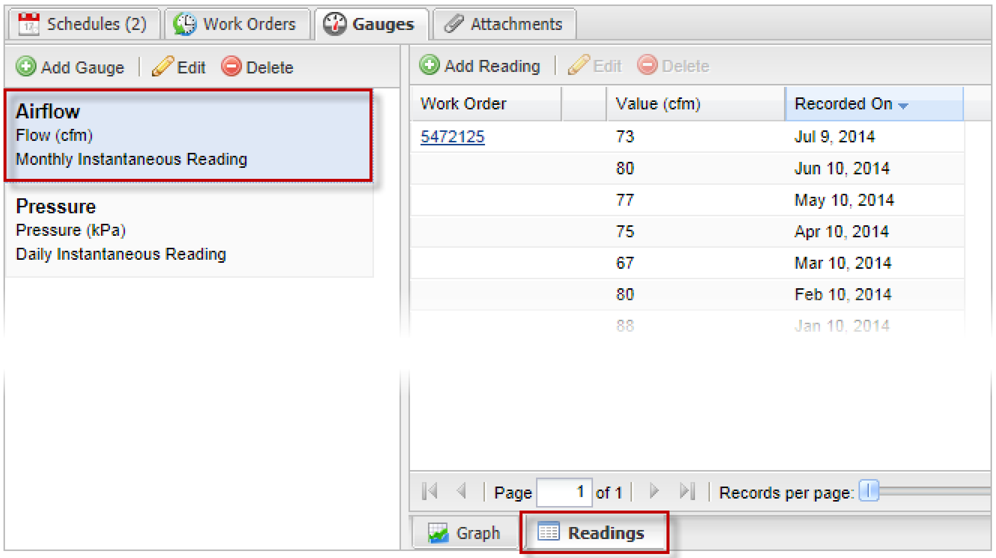
2. At the bottom of the Gauges tab interface, select the Graph sub-tab if it is not already selected. The graph will be displayed to the right.

   - Hover your mouse over the graph to view detailed information concerning the plot lines on the graph.
   - The Show Readings drop-down list allows users to select the number of recent readings to display.
   - The **Show/Hide Marker** button ( ) can be used to show or hide the graph's plot points.
   - The **Show/Hide Label** button ( ) can be used to show or hide the numbers displayed on the graph line.

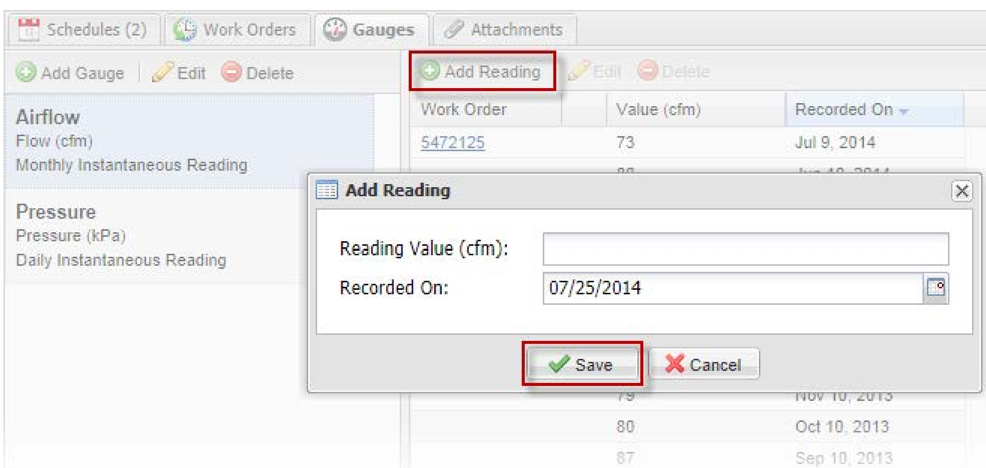


Adding and Editing Gauge Readings

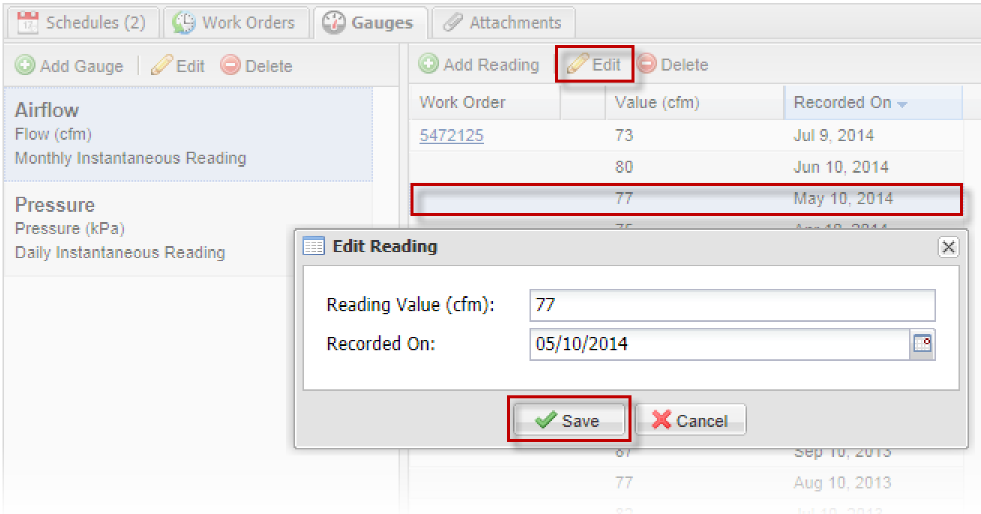
Selecting the Readings tab (to the right of the Graph tab at the bottom of the screen) displays a list of all gauge readings taken for the gauge that have been selected on the left side of the interface. If a work order is associated with the collection of the reading, users can click on the work order number to view the work order's details.



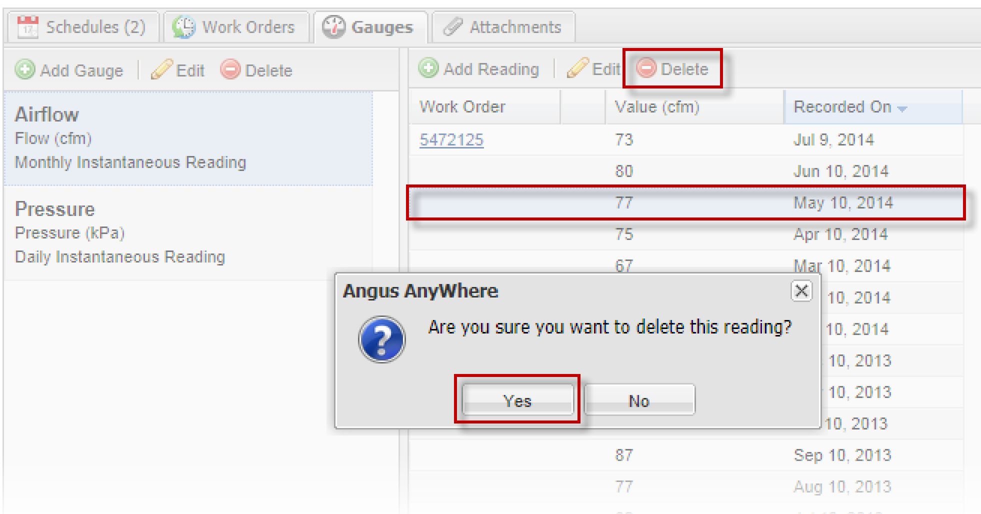
- Users can add a reading by clicking **Add Reading**. In the Add Reading window that opens, enter a reading value, the date the reading was recorded, then click **Save**.



- To edit a reading, select a reading from the list and click **Edit**. In the Edit Reading window that opens, users can update the reading value and/or the date the reading was recorded. Click **Save** to update the reading.



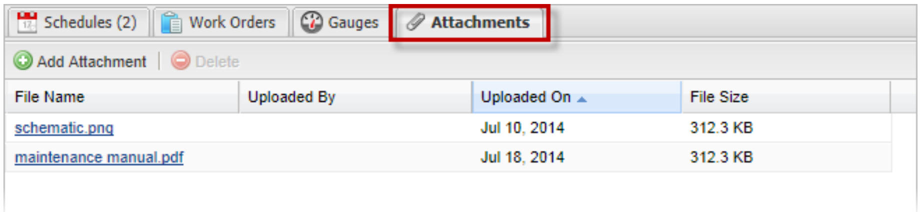
- To delete a reading, select a reading from the list and click **Delete**. In the confirmation window that opens, click **Yes** to delete the reading.



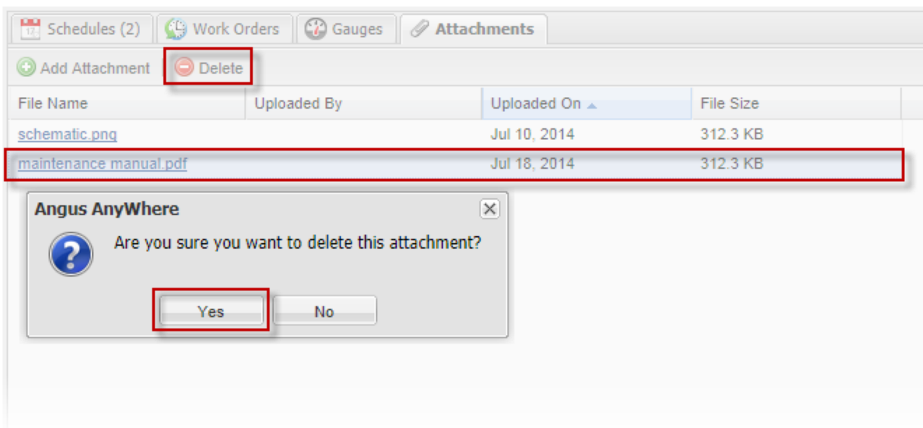
The Attachments Tab

> **!** Each attachment can be up to 10MB in size. Files which exceed this size limit cannot be uploaded.

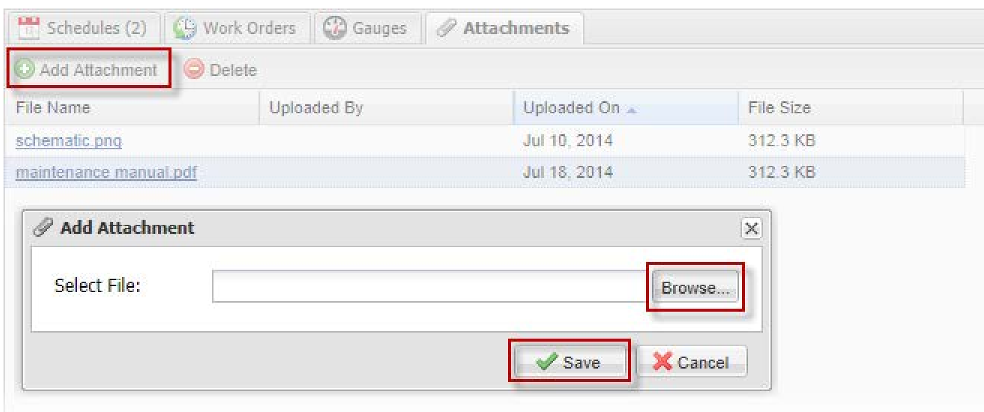
The Attachments tab displays a list of any files (such as MS Word documents, pictures or PDF files) associated with the equipment. Attachments are included on scheduled work orders.



- Click on a file name to download it; if the file is in a format which can be displayed within a web browser, then it will be displayed in a separate browser window.
- Users can remove an attachment by selecting an attachment and clicking **Delete**. In the confirmation window that opens, click **Yes**.



- Users can upload an attachment by clicking **Add Attachment**.



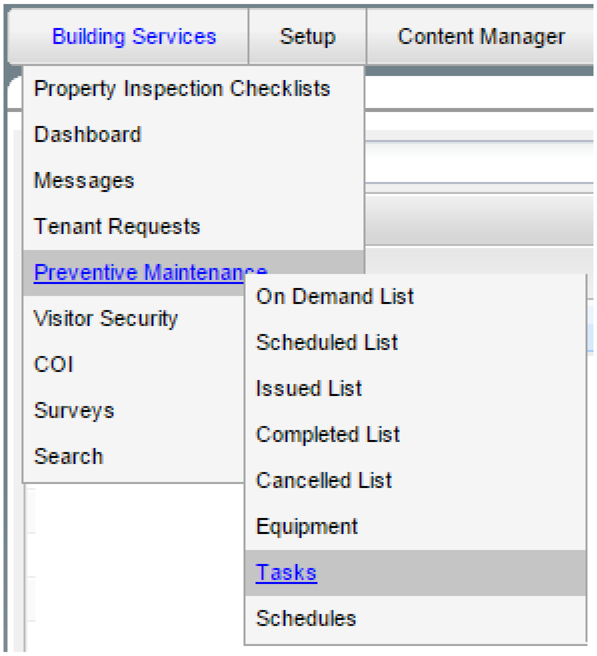
- In the window that opens, click **Browse…**
- Select the file to upload in the file selection window that is displayed and click **Open**.
- In the Add Attachment window, click **Save** to complete the process.

Tasks

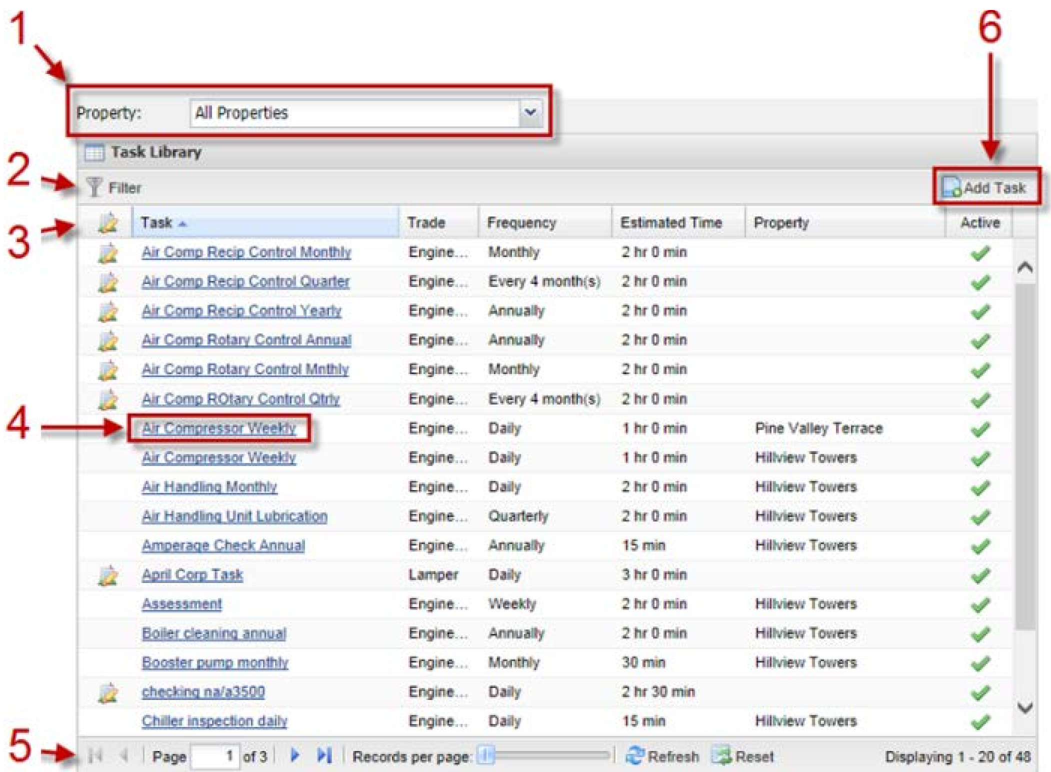
The Task Library List

The Task Library list displays all tasks that have been entered into the PM work order system. Tasks are used to create maintenance schedules on the Equipment Details screen.

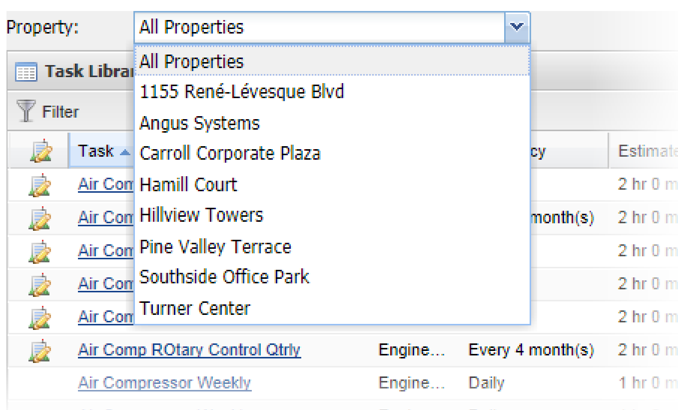
To access the Task Library list, log into the Axis Control Panel at http://cp.axisportal.com, hover over **Building Services**, hover over **Preventive Maintenance**, and click on **Tasks**.



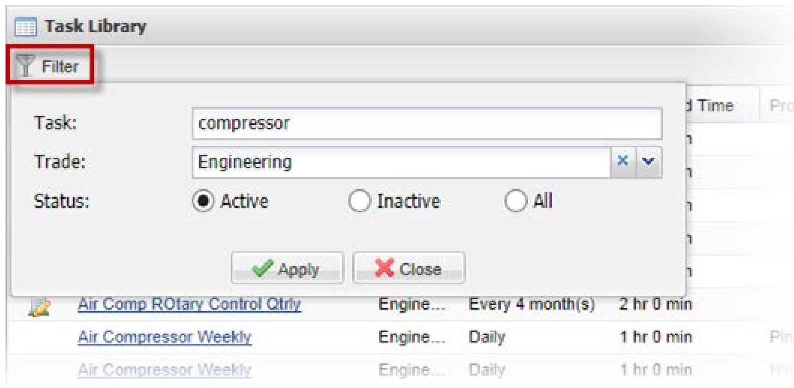
The Task Library displays a list of all tasks that have been created for equipment maintenance. One or more tasks can be used to create a work order schedule. An overview of the various sections in the Task Library list are detailed below.



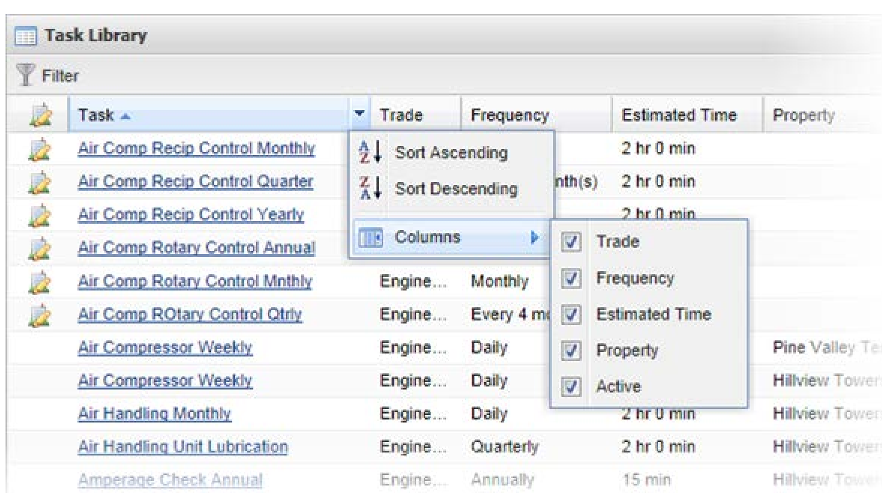
1. Use the Property drop-down to filter the list by property.



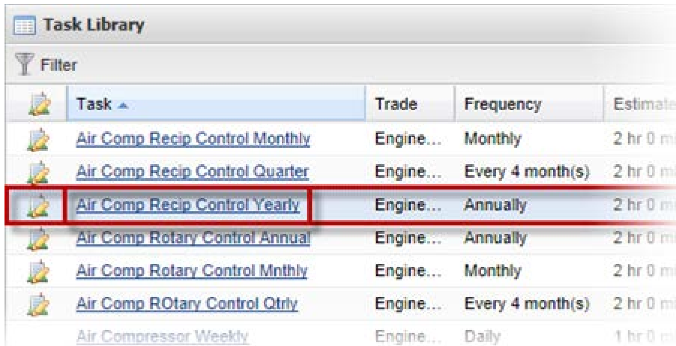
2. The **Filter** button opens an interface that allows users to choose a variety of filtering options. Filtering information is stored locally on your web browser and is remembered between sessions. The following filtering options are available:
   - **Task**: Filter by task name.
   - **Trade**: Filter by associated trade.
   - **Status**: Display only active tasks, inactive tasks, or both (all).



3. The list headings are customizable. All list customizations for a specific user are remembered between sessions and stored locally on your web browser.
    - Users can click on a list heading to toggle between sorting the list in ascending or descending order.
    - Click and drag on headings to change the order they are displayed in.
    - Users can add or remove list headings by doing the following:
        - o Click on the right side of a column heading (near the border between column headings, as shown in the image on the right).
        - o Move your mouse pointer to the Columns entry in the list to display all available column headings.
        - o Select the column headings that are preferred to be displayed and/or deselect the headings that are preferred to be hidden. Note that some information-critical headings cannot be hidden.

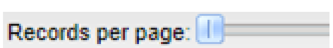


4. Clicking on a task name or double-clicking on a row in the list will display the task's details page. For more information, see the Task Details Screen topic.



5. At the bottom of the list is a control toolbar that allows users to access several commonly used display features.

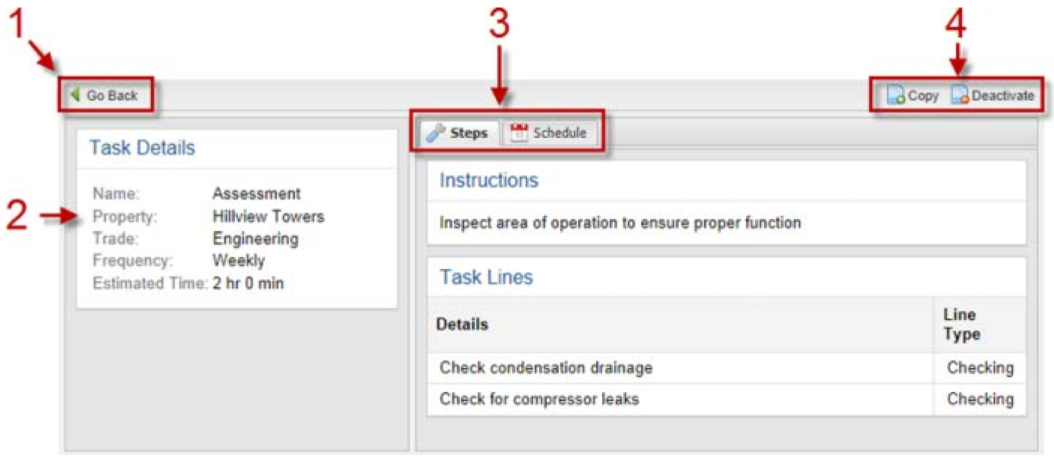
The following list controls are available:

	Return to the first page of the list.
	Go to the previous page.
 Page 1 of 1	Manually enter a specific page to go to.
	Go to the next page.
	Go to the last page.
 Records per page:	Use the slider to adjust the number of records displayed per page.
 Refresh	Reload the list (checks for updates to the list since it was last loaded).
 Reset	Reset the list display settings to default (also removes any previously applied filters).

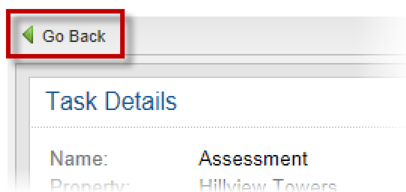
6. Click **Add Task** to create a new entry in the Task Library. See *Adding Tasks* (p. 49) for additional details.

The Task Details Screen

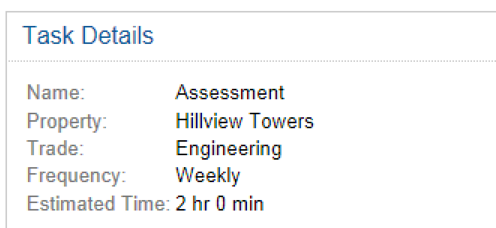
The Task Details screen is accessed by clicking on the name of an item in the Task Library list. An overview of the various sections in the Task Details screen are detailed below.



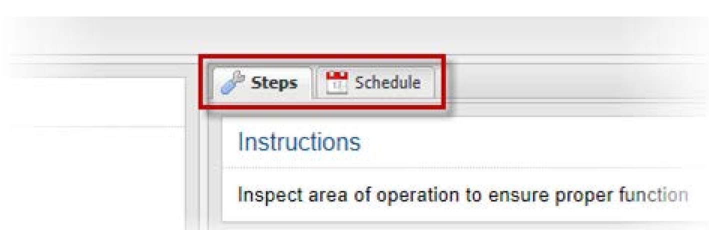
1. The **Go Back** button returns to the previous screen.



2. The Task Details card displays basic information concerning the task. Users can click on the card to edit it.

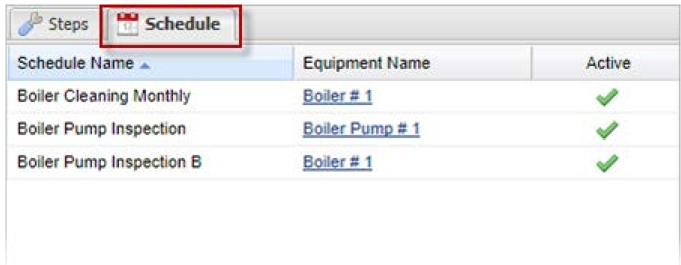


3. The Steps and Schedule tabs are explained below.

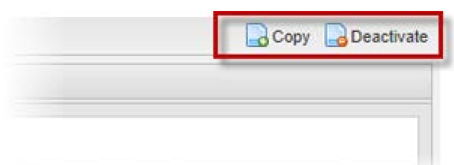


- The Steps tab contains the Instructions and Task Lines cards. Users can click on these cards to edit them. See *Editing Tasks* (p. 51) for additional details.

- The Schedule tab displays schedules that use this task, including the equipment the schedules are associated with.
    - Double-clicking on a row, or clicking directly on the Equipment name displays the Equipment Details screen.



4. The **Copy** and **Deactivate** buttons provide the following functions:
    - The **Copy** button allows users to create a copy of the task. This is particularly useful when users have identical or very similar tasks to enter into the Task Library.
    - The **Deactivate** button can be used to indicate that the task is no longer in use. Deactivation preserves the task in work order histories and prevents new work orders from including the task. Deactivated tasks can also be reactivated. For additional details, see *Deactivating Tasks* (p. 55) and *Reactivating Tasks* (p. 56).



About Task Lines

Task Lines are the associated steps of a task. Task Lines prompt the Engineer to make checks or take readings of equipment. Task Lines are included on the work order that is transmitted to the Engineer’s device.

If users plan on using this task with other tasks on the same schedule (multitask schedules), keep in mind that a work order with multiple tasks displays all of the task lines entered for each task. Therefore, users should make sure that tasks do not overlap and cover (partially or fully) the same maintenance to avoid duplication.

If data has been converted from another application, users may find that clean-up is required for Task Lines because task details are often interpreted as lines of text.

There are three types of task lines:

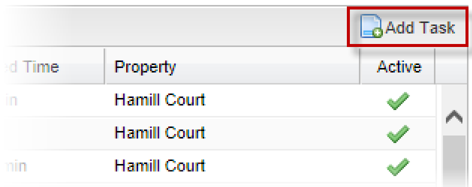
- **Reading**
  Select this option if the Task Line requires a numerical reading involving the equipment, such as an inventory count. If users want to take a gauge or meter reading, it is recommended that instead of using a Reading task line that users add a gauge to the equipment, which can be included in work order schedules. This will allow users to more concisely display, edit and update the gauge readings they have accumulated over time.
- **Checking**
  Select this option if the Task Line requires a checkbox to check on the work order. This is the most commonly used type of Task Line.
- **Details**
  Select this option if the Task Line requires additional detailed information or instructions.

Adding Tasks

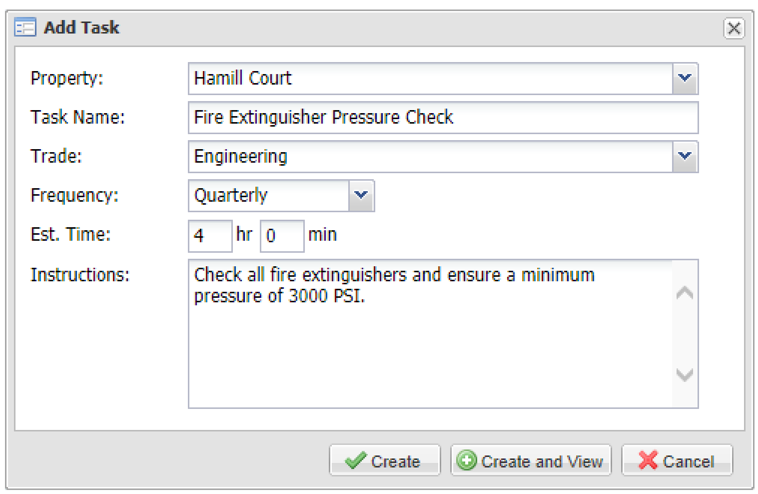
Tasks can be added in the Task Library list. Tasks are reusable; for example, if they are sufficiently generic, then a single "boiler cleaning" task could be used in schedules for any boiler unit in the Equipment list.

> **!** In cases where it is not possible (or reasonable) to create a generic task suitable for all similar pieces of equipment, separate **appropriately named** tasks should be entered into the system; this will allow the correct task to be more easily identified when setting up schedules for your equipment.

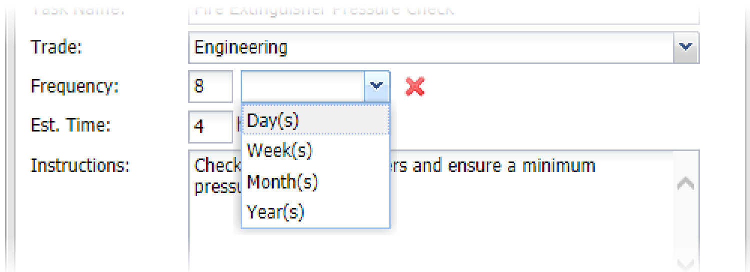
1. From the Task Library list, click **Add Task**.



2. Provide the following information in the Add Task window:



- The Property where the task will be taking place (only corporate tasks apply to all properties).
- Create a name for the task.
- Select the trade that this task applies to.
- Select how frequently the task should occur in the Frequency field. The following options are available: Daily, Weekly, Monthly, Quarterly, Semi-annually, Annually, or More Options…
    - Clicking "More Options" changes the drop-down, allowing users to select a more specific time interval, such as 8 months, 4 years, etc., as shown below.

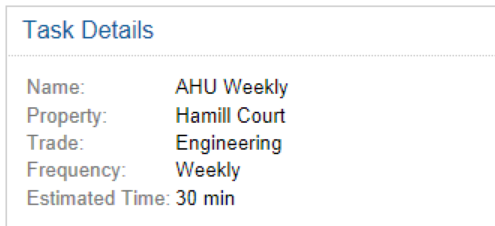


- Enter the estimated time it will take to complete the task, and any general instructions concerning the task.

3. Click **Create** to create the task, or **Create and View** to create the task and then view the Task Details screen, where users can edit the task. See *Editing Tasks* (p. 51) for additional details.

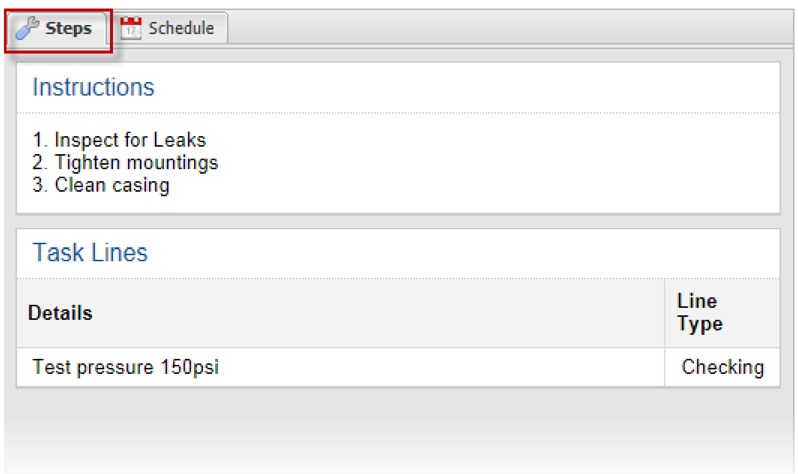
Editing Tasks

1. Tasks are edited from the Task Details screen. If not already viewing the task details, locate the task in the Task Library list, then open the task details by clicking on the task name.
2. The Task Details card displays basic information concerning the task. Users can click on the card to edit it.

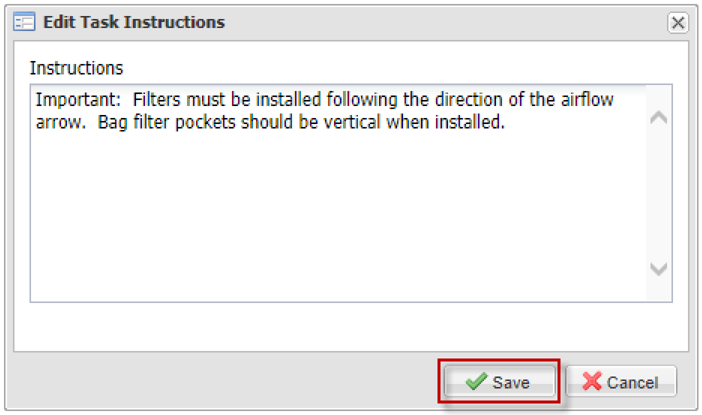


- Users can click on this card to edit it, update the information on the card in the Edit Task window that opens, then click **Save**.

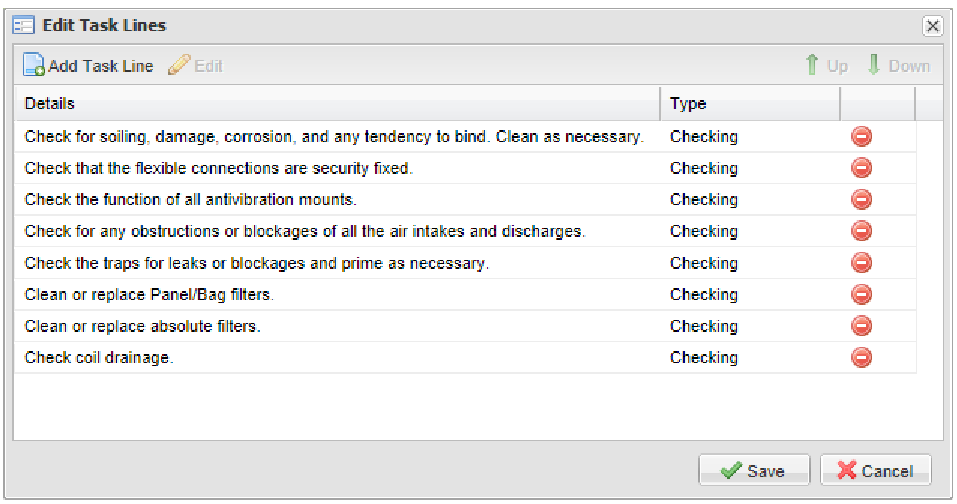
3. The following information can be edited under the Steps tab.



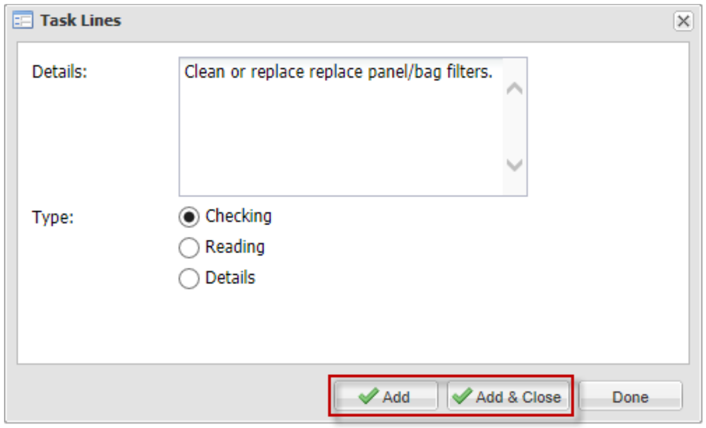
- The Instructions card displays a description of how the task is to be conducted. Users can click on this card to edit it, update the information on the card in the Edit Task Instructions window that opens, then click **Save**.



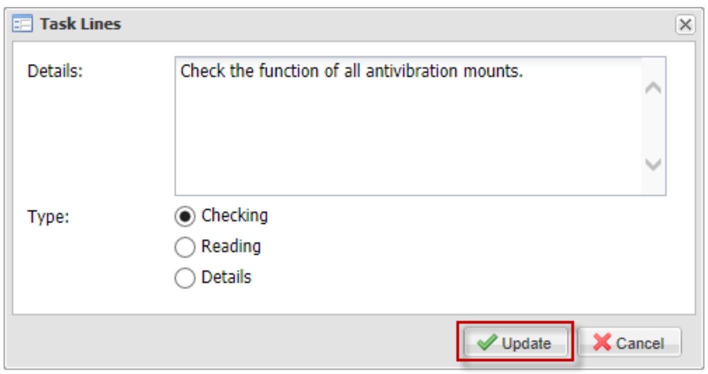
- The Task Lines card displays the steps which must be performed to complete the task. Click on the card to edit it; this will open the Edit Task Lines window.



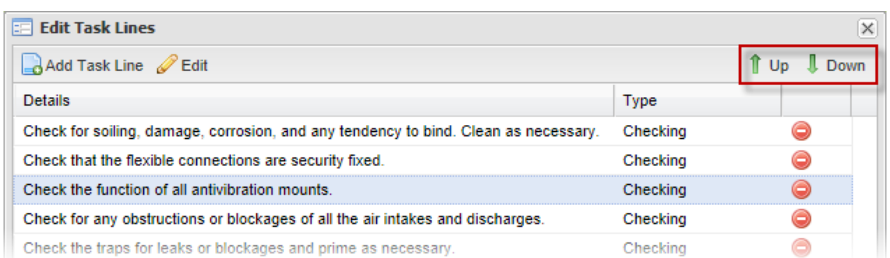
- Users can add a task line by clicking **Add Task Line**. In the window that opens, enter the task's details, then select the task type (checking, reading, or details). For a description of each task type, see *About Task Lines* (p. 48).
    - Click **Add** to save this task and add another task.
    - Click **Add & Close** to save the task and return to the Edit Task Lines window.



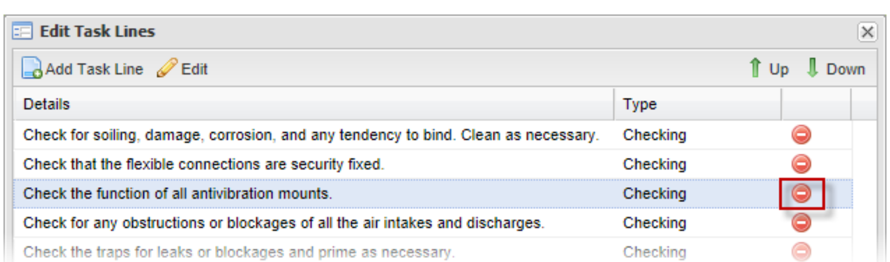
- Users can edit a task line by selecting the task and clicking **Edit**. Make any necessary changes, then click **Update**.



- Users can change the order that the task lines are displayed by selecting a task and using the **Up** and **Down** arrow buttons.

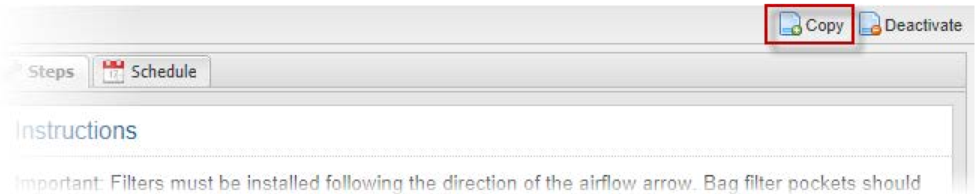


- Users can delete a task by clicking the associated **Delete** button () to the right. Users will be asked to confirm the deletion in a popup window.

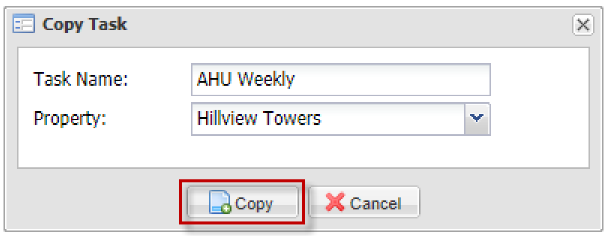


Copying Tasks

1. Tasks are copied from the Task Details screen. If not already viewing the Task Details, locate the task in the Task Library list, then open the Task Details by clicking on the task name.
2. From the Task Details screen, click **Copy**.



3. In the Copy Task window that opens, edit the name for the task (if applicable). Task names must be unique within the property; for example, users can have an "AHU Weekly" task in two different properties, but users cannot have two tasks with that name in the same property.
4. Select the property the task needs to be copied over to.
5. Click **Copy** to copy the task.



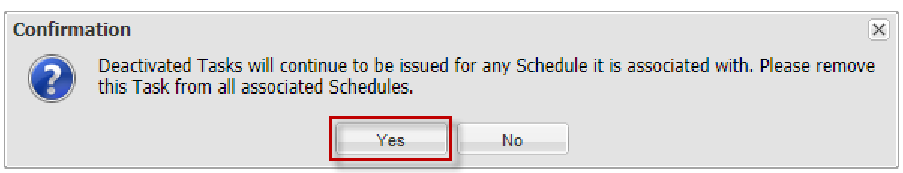
Deactivating Tasks

In order to preserve work order histories, users cannot delete tasks, but users can deactivate them. This prevents them from being added to new schedules, but will still be issued for any schedule that it is currently associated with. Users will need to remove the task from currently existing schedules which use the deactivated task.

- If necessary, users can update their schedules, so they no longer use the inactive task. While viewing a task, users can see what schedules a task is associated with by clicking on the **Schedule** tab; from there, users can click on the name of the equipment to view the equipment's details, where they can either deactivate the schedule, or edit the schedule to remove the task.
- To see deactivated tasks, users will need to change the Task Library's filter settings to display inactive tasks. Once the inactive task has been found, users can click on the task's name to view the Task Details.
- Users can reactivate previously deactivated tasks.

1. Tasks are deactivated from the Task Details screen. If not already viewing the Task Details, locate the task in the Task Library list, then open the Task Details by clicking on the task name.
2. From the Task Details screen, click **Deactivate**.

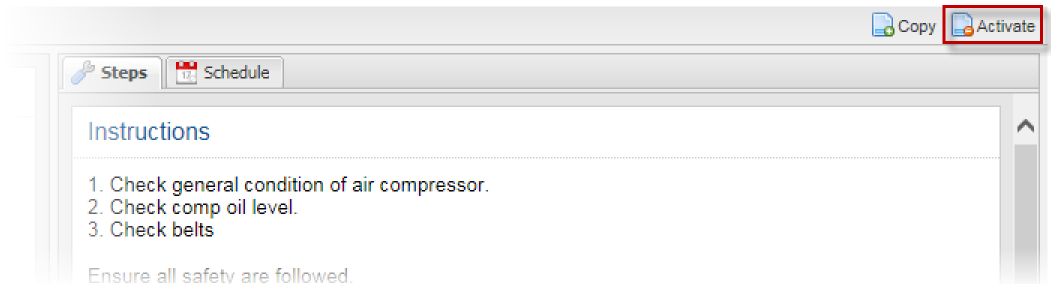
3. In the confirmation window, click **Yes**. The task is now deactivated.



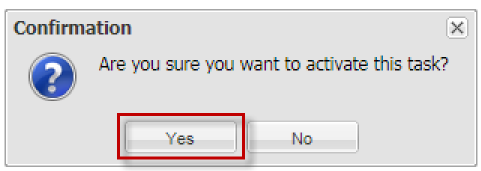
Reactivating Tasks

If a task was deactivated in error, or if a previously deactivated task is needed, it is possible to reactivate the task. This allows the task to once again be added to schedules.

1. Tasks are reactivated from the Task Details screen. If not already viewing the task details, locate the task in the Task Library list. To see deactivated tasks, users will need to change the Task Library's filter settings to display inactive tasks. Once the inactive task has been found, click on the task's name to view the task details.
2. From the Task Details screen, click **Activate**.



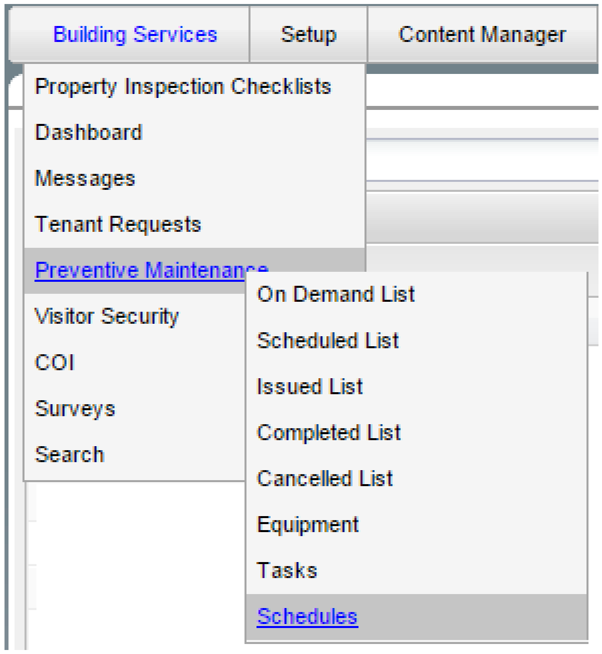
3. In the confirmation window, click **Yes**. The task is now activated.



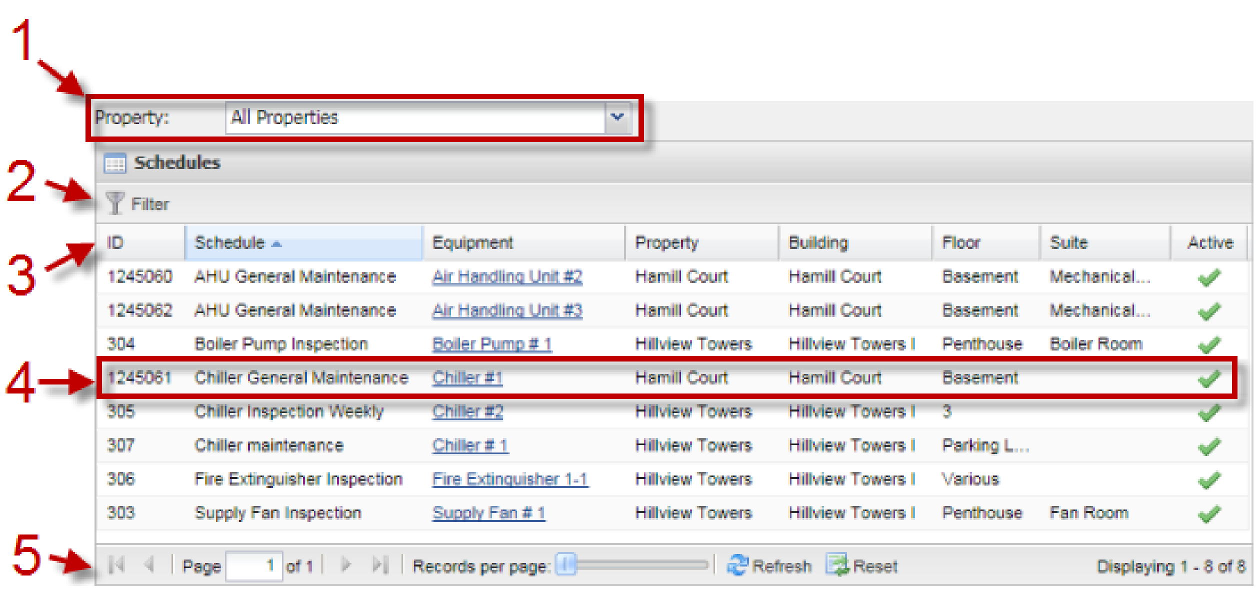
The Schedules List

> *i* Schedules are added directly to a piece of equipment using the associated Equipment Details screen. While new schedules cannot be added directly to the Schedules list, it can be used to quickly locate a schedule for editing, copying, deactivation or reactivation.

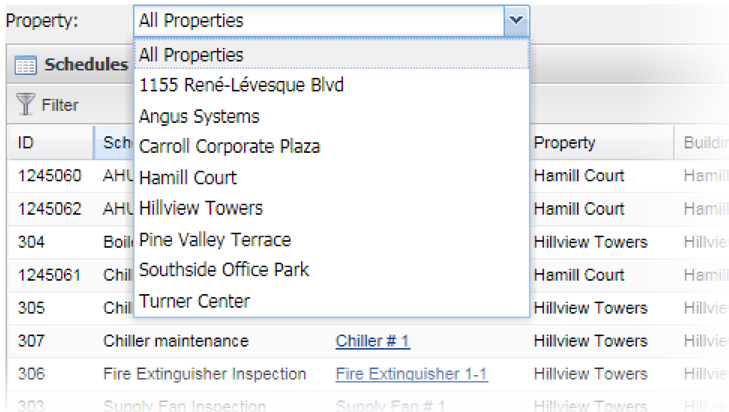
To access Schedules, log into the Axis Control Panel at http://cp.axisportal.com, hover over **Building Services**, hover over **Preventive Maintenance**, and click on **Schedules**.



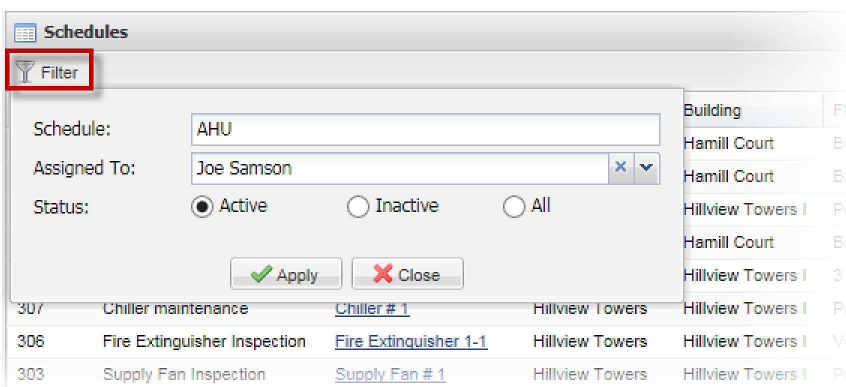
By default, this list displays all schedules that have been set up for equipment across all properties. An overview of the list's functions and options are detailed below.



1. Use the Property drop-down to filter the list by property.

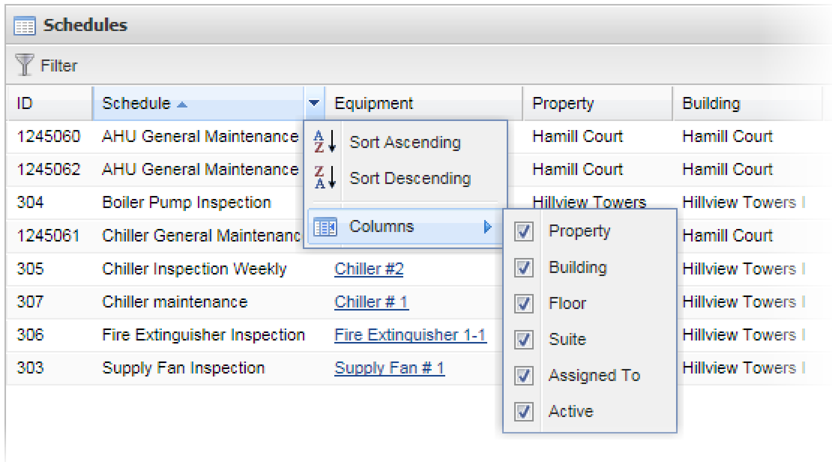


2. The **Filter** button opens an interface that allows users to choose a variety of filtering options. Filtering information is stored locally on your web browser and is remembered between sessions. The following filtering options are available:
    - **Schedule**: Filter by schedule's name.
    - **Assigned To**: Filter by the assigned employee or vendor.
    - **Status**: Display only active schedules, inactive schedules, or both (all).

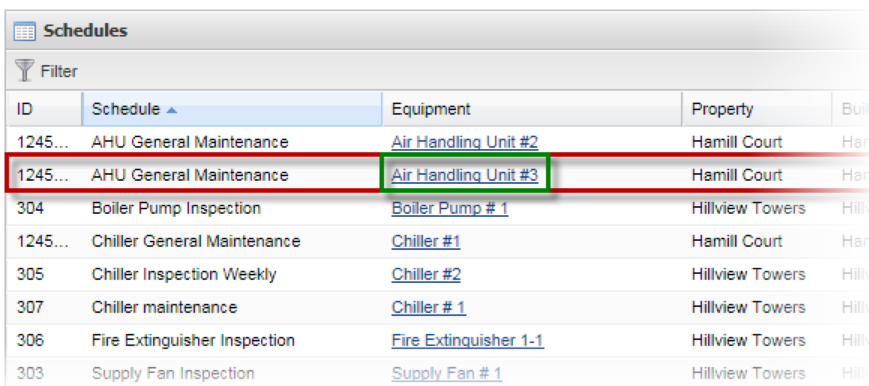


3. The list headings are customizable. All list customizations for a specific user are remembered between sessions and stored locally on your web browser.
    - Users can click on a list heading to toggle between sorting the list in ascending or descending order.
    - Click and drag on headings to change the order they are displayed in.
    - Users can add or remove list headings by doing the following:
        - Click on the right side of a column heading (near the border between column headings, as shown in the image on the right).

- Move your mouse pointer to the Columns entry in the list to display all available column headings.
- Select the column headings that are preferred to be displayed and/or deselect the headings that are preferred to be hidden. Note that some information-critical headings cannot be hidden.



4. To view a schedule, click on the schedule's name, or double-click on the row. This will take users to the Schedules tab of the associated Equipment Details screen.



5. At the bottom of the list is a control toolbar that allows users to access several commonly-used display features.

The following list controls are available:

	Return to the first page of the list.
	Go to the previous page.
	Manually enter a specific page to go to.
	Go to the next page.
	Go to the last page.
	Use the slider to adjust the number of records displayed per page.
	Reload the list (checks for updates to the list since it was last loaded).
	Reset the list display settings to default (also removes any previously applied filters).

About Employee Available Hours

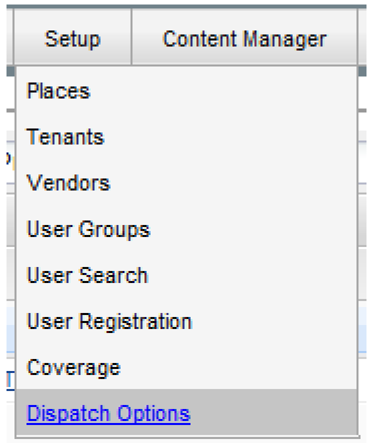
The Employee Available Hours screen captures the number of available Tenant Request (TR) and PM staff hours for the next four weeks. The data generated in the Resources Forecast Report is based on these hours and helps determine whether there are enough staff member resources to complete the work ahead. This feature is particularly useful in large facilities with many Engineers and vendors working and smaller facilities likely do not require this feature.

Weekly data fields for both TR and PM for each property are displayed. Employee available hours for the past three weeks are also displayed. The upcoming four-week entries can be modified. Each week the Employee Available Hours table will be automatically adjusted to allow for entry in the upcoming fourth week.

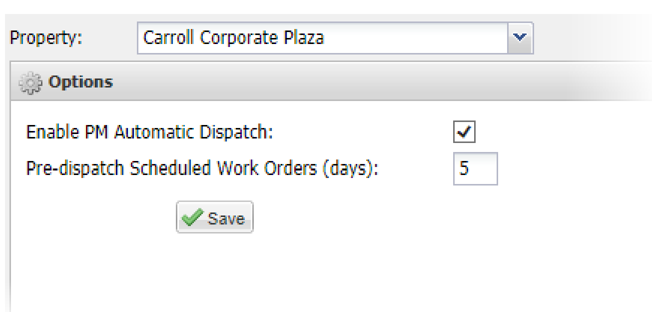
PM Work Order Dispatch Options

Configuring your PM dispatch options allows users to enable automatic dispatching for PM work orders on a per-property basis. Follow the steps below to enable, update, or disable automatic dispatching.

1. Hover over Setup and click on **Dispatch Options**.



2. In the Filter section, click the **Property** field and select the desired property from the drop-down list.
3. To enable automatic dispatching, click the **PM Automatic Dispatch** checkbox if it is not currently checked (unchecking this box will disable automatic dispatching for the selected property).
4. Users can modify the Pre-dispatch Scheduled Work Orders (days) field to select the number of days before the due date that the system should attempt automatic dispatching.
5. Click **Save**.

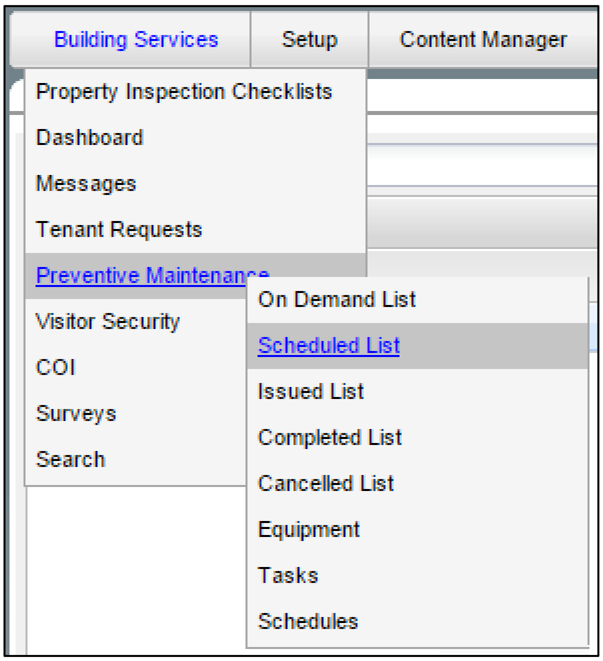


Using Preventive Maintenance

PM Work Order Types

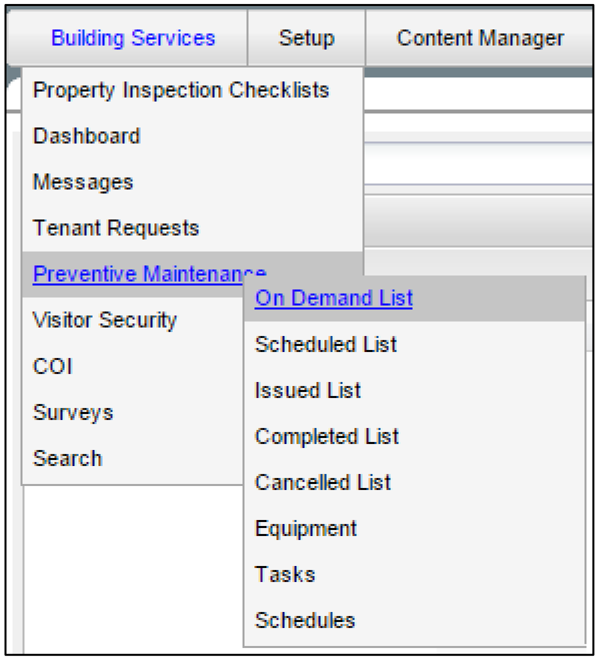
There are two types of Equipment work orders in the PM work order system: Scheduled and On Demand. The majority of work orders used will be scheduled. On demand work orders are only created when there is unscheduled maintenance that needs to be recorded in the system.

Scheduled Work Orders



Scheduled work orders are generated regularly and are based on PM schedules. On the Scheduled list, the next two weeks of work orders are displayed. A longer time interval can be displayed using the filter options. Fixed-period work orders are automatically canceled by the system if and when they go one period overdue.

On Demand Work Orders



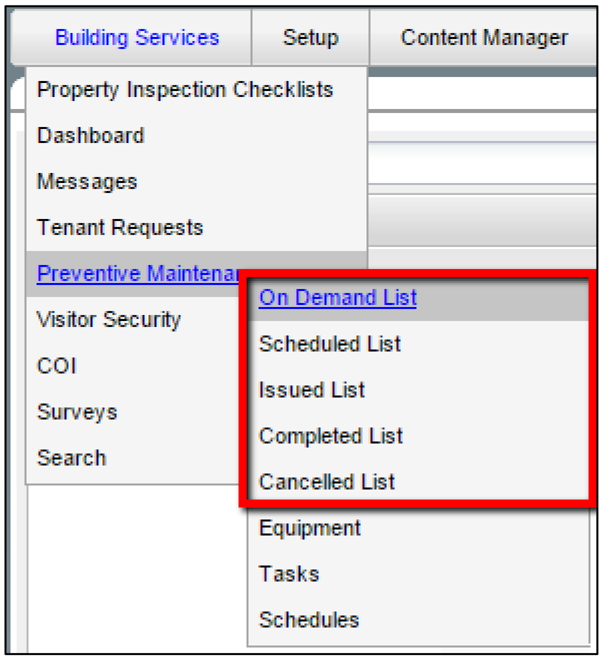
On demand work orders are created in response to an unplanned need for equipment-related service. On demand work orders can be created before or after the actual work is complete.

When an on demand work order is created, it is displayed in the On Demand List. These work orders will remain on this list until it is completed or canceled. When an on demand work order is assigned and dispatched, it will also be displayed in the Issued List.

PM Work Order Lists

> *i* For general information on viewing, editing and updating work orders, please refer to *Work Order Details Overview* (p. 74).

There are five lists for PM work orders: On Demand, Scheduled, Issued, Completed, and Canceled. Users view work orders in each state by opening the associated work order list:



- **On Demand**
  The On Demand List displays all work orders that have been created to handle unscheduled maintenance. On demand work orders can be assigned and issued at any time and are displayed on this list until completed or cancelled (they are then displayed in either the Completed or Cancelled lists, respectively). On demand work orders that have been assigned and dispatched are also displayed in the Issued List.

> *i* All on demand work orders are identified in lists with the On Demand status icon ( ).

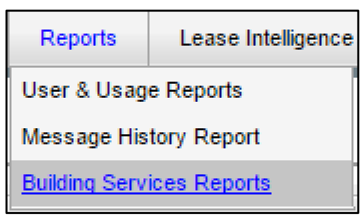
- **Scheduled**
  The Scheduled List indicates which work orders are ready to be issued or scheduled for dispatch. This list allows administrative staff to review and make any necessary changes

before the work order is issued; see *Work Order Details Overview* (p. 74) for general information on viewing, editing and updating work orders.

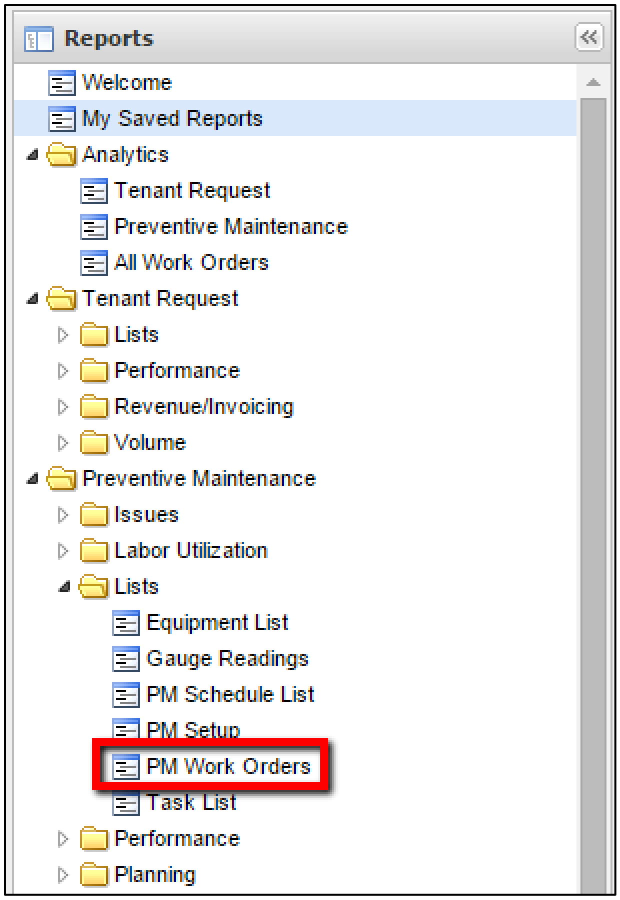
> *i*
> - A floating work order cannot be issued if a previous work order is still outstanding for the same task; it must be cancelled or completed before a new work order can be issued.
> - Floating work orders are identified in lists with the Floating status icon (F).

- **Issued**
  The Issued List indicates that the work order has been dispatched. Issued work orders can be reissued and reassigned. This can be useful in the event of staff turnover or staff workload issues.
  - Reissuing a work order does not delete or "pull back" the previously issued work order, resulting in two electronic copies in the system. In cases where re-issuing is performed from one active tradesperson to another, have the engineer manually delete the work order from their device (only applies to email and RIM devices).
- **Completed**
  The Completed List displays completed work orders. Work orders remain in the Completed List for 45 days from the date of completion. Flags for missing values are also displayed on this list (see *Missing Values* (p. 91) for more information). A list of Completed work orders is available via the PM Work Orders report.

  To access the PM Work Orders report, log into the Axis Control Panel at http://cp.axisportal.com, hover over **Reports**, and click on **Building Services Reports**.



  The PM Work Orders report can be found by expanding the Lists folder under the Preventive Maintenance folder.



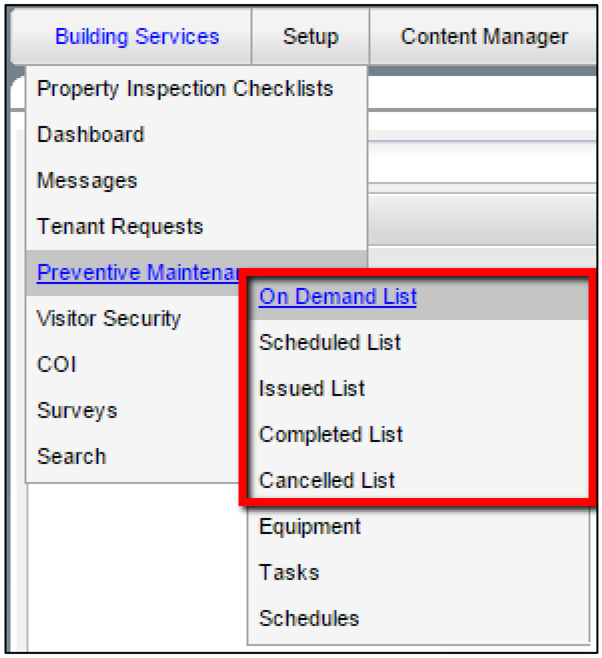
> *i* Completed work orders that require review form a supervisor will be marked with the Notify Supervisor status icon ( ) and are not cleared form the completed list until this flag is removed. For additional details, see *The Notify Supervisor Flag* (p. 90).

- **Cancelled**

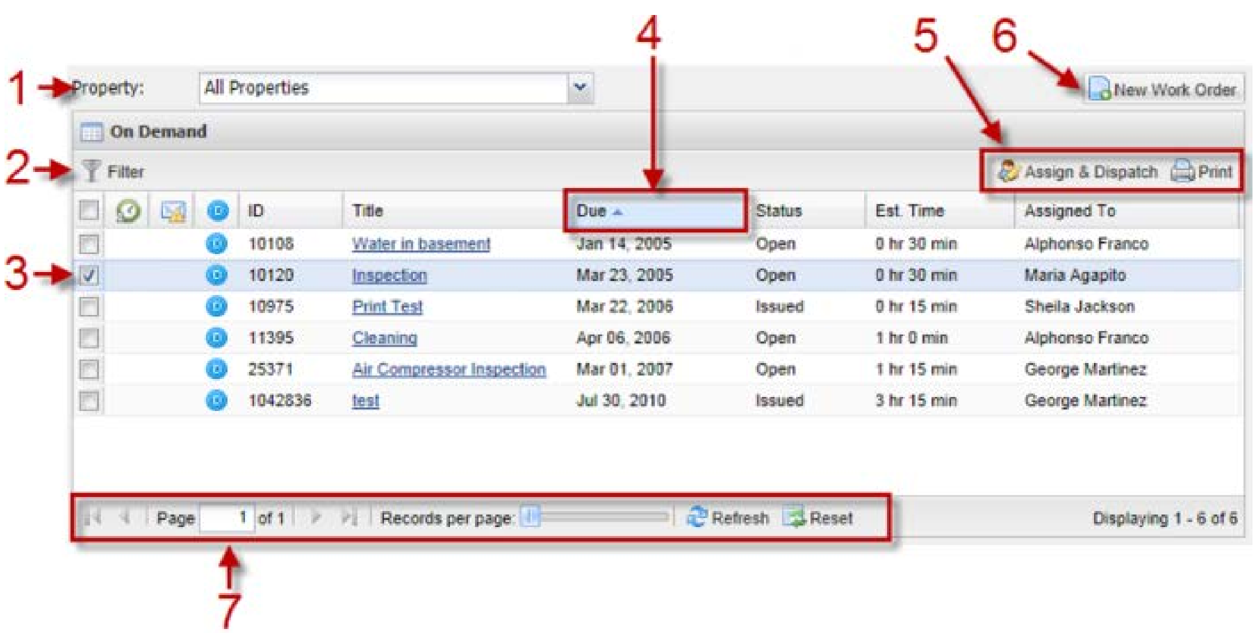
  The Cancelled List shows all work orders that were cancelled in the last 45 days. Work orders that are Ready, Issued, or Completed can be manually cancelled. For example, users may need to manually cancel a work order if the schedule needs to be made inactive, or if equipment is out for repair.

List Controls, Customization, and Filtering

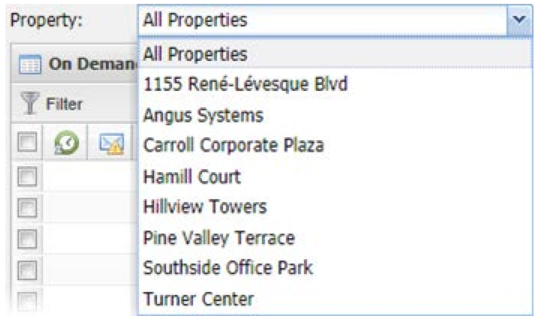
To access PM lists, log into the Axis Control Panel at http://cp.axisportal.com, hover over **Building Services**, hover over **Preventive Maintenance**, and then select the desired list from the Preventive Maintenance folder.



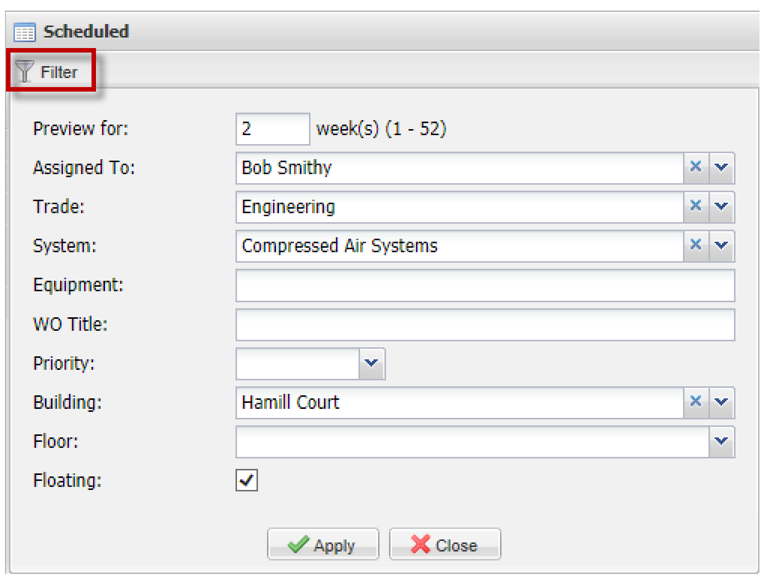
Each PM list can be sorted, filtered and customized in a variety of ways, as described below. For more information about the work order lists and work order statuses, see *PM Work Order Types* (p. 64) and *PM Work Order Lists* (p. 66).



1. Users can use the Property drop-down list to filter the work orders by property, or for all properties.



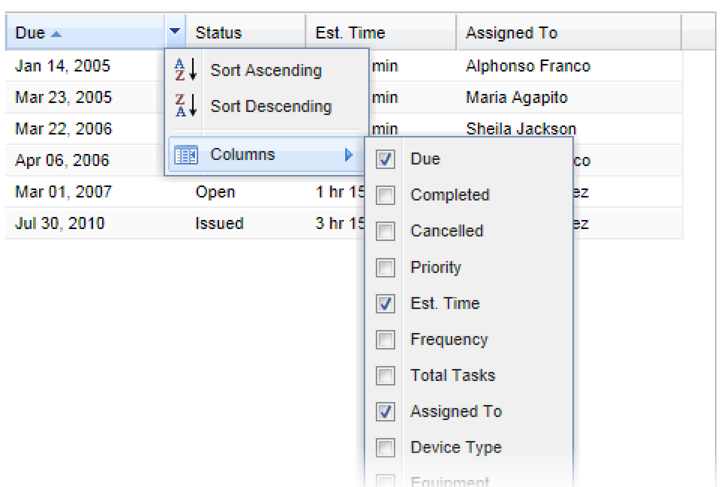
2. The **Filter** button opens an interface which allows users to choose from a variety of filtering options. The specific options available vary by list.
    - Applied filters are persistent on the list until manually removed or if the Property is changed.
    - Filtering information is stored locally on your web browser and is remembered between sessions.
    - In the Scheduled List in particular, users can modify the Preview for field to increase the period of time over which work orders are displayed.



3. Use the checkboxes to select one or more work orders in the list.
    - Selecting multiple entries in the list allows users to assign and dispatch, or print multiple items at a time as explained in (5) below.
    - Click on a work order's name in the Title column to view its details.

4. The list headings are customizable. All list customizations for a specific user are stored locally on your web browser and remembered between sessions.

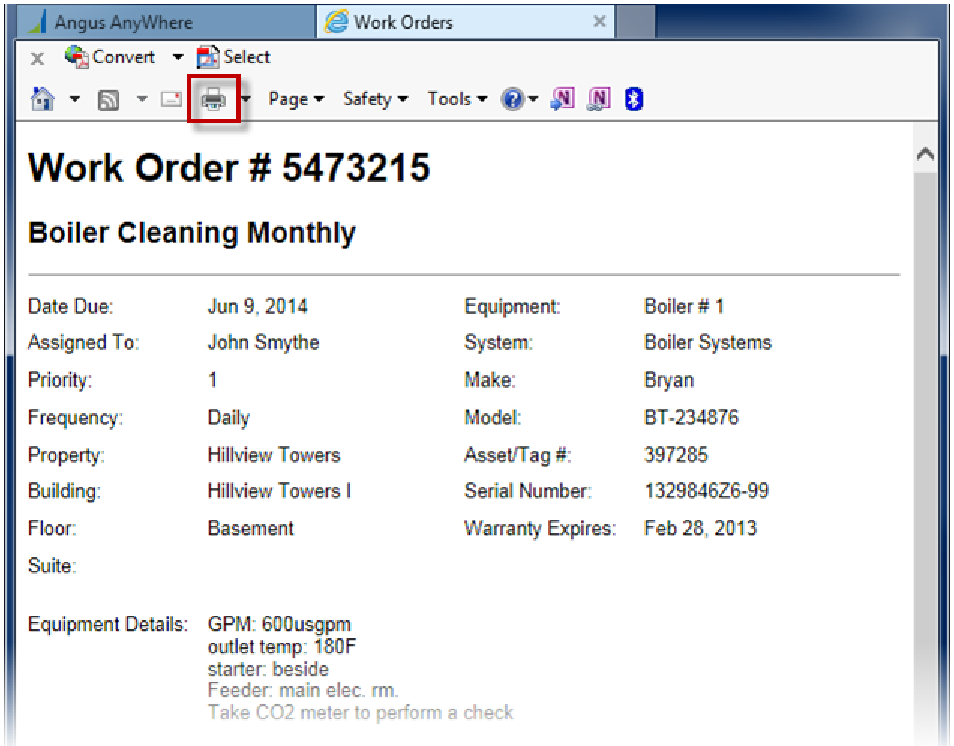
   - Users can click on a list heading to toggle between sorting the list in ascending or descending order.
   - Users can click and drag list headings to change the order they are displayed in.
   - Users can add or remove list headings by doing the following:
     - Click on the right side of a column heading (hear the border between column headings, as shown below).
     - Move the mouse pointer to the Columns entry in the list to display all available column headings (available headings vary depending on which list is currently being viewed).
     - Select the column headings that are preferred to be displayed and/or deselect the headings that are preferred to be hidden. Note that some information-critical headings cannot be hidden.



5. The **Assign & Dispatch** and **Print** buttons perform the functions described below:

- Clicking the **Assign & Dispatch** button opens the Assign & Dispatch window, allowing users to assign (if currently unassigned) or reassign the selected work orders. The exact choices available will vary depending on how many work orders are selected (one, or more than one), whether the work orders have been dispatched, and whether they are on demand or scheduled work orders.
    - Users can also set (or change) the due date. This option is only available if the work order selected is a single on demand work order that has not yet been dispatched.
    - Users can select whether or not to dispatch the work order immediately.
    - Click **Save** to save your changes. This will also dispatch the work order if "dispatch immediately" was selected.
    - See *Assign and Dispatch Work Orders* (p. 79) for additional information.

- For dispatched work orders, clicking the **Print** button opens a new window with a copy of the work order in a printable format. Click the **Print** icon ( ) or press **CTRL-P** to print the work order.
    - Printed work orders can be used to complete work in situations where the assignee does not have direct access to the Internet; the information filled out in the form will need to be manually input in Axis Control Panel afterwards to properly document the work.



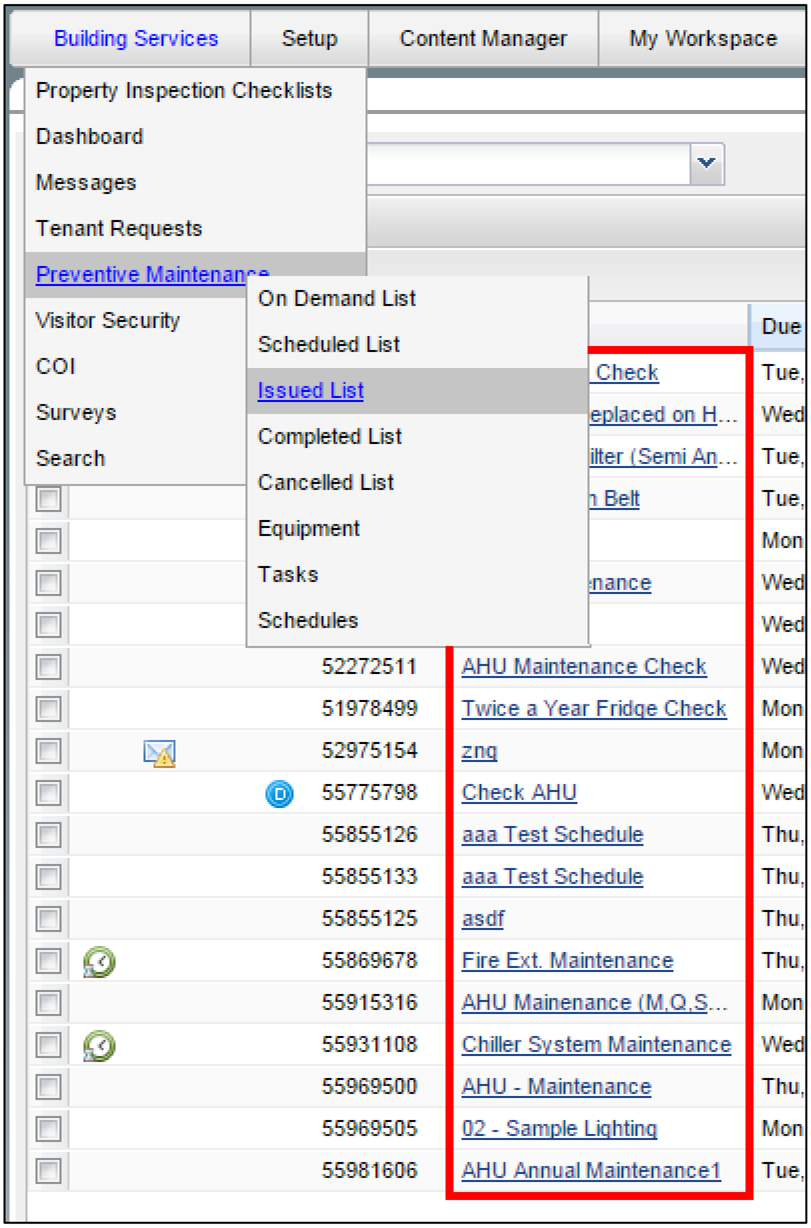
6. The **New Work Order** button allows users to create an on demand work order. For additional details, see *Creating On Demand Work Orders* (p. 82).
7. At the bottom of each list is a control toolbar that allows users to access several commonly used display features.

The following list controls are available:

	Return to the first page of the list.
	Go to the previous page.
Page 1 of 1	Manually enter a specific page to go to.
	Go to the next page.
	Go to the last page.
Records per page:	Use the slider to adjust the number of records displayed per page.
Refresh	Reload the list (checks for updates to the list since it was last loaded).
Reset	Reset the list display settings to default (also removes any previously applied filters).

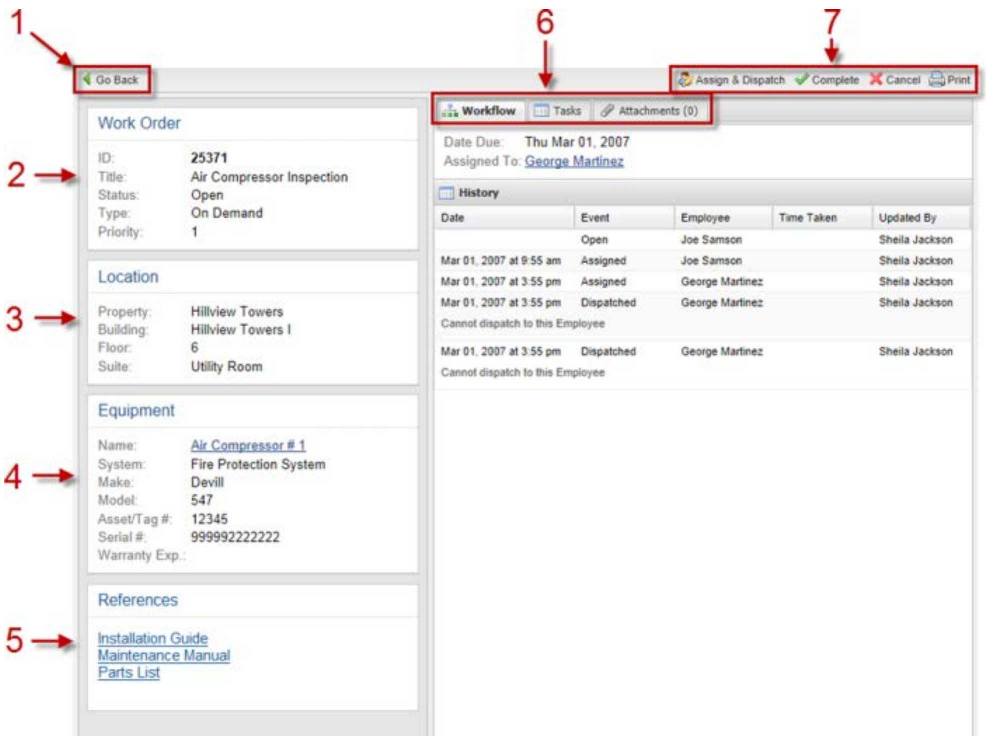
Work Order Details Overview

This topic provides a general overview of the functions available in the Work Order Details screen. Users can access this screen from any of the work order lists and clicking on the title of the work order they want to view or work with.

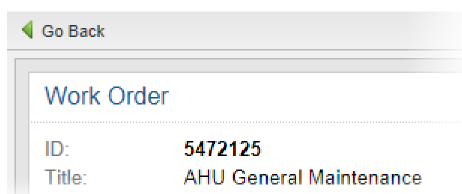


The Work Order Details screen displays all information related to the work order, including basic work order and equipment information, task details and any additional attachments or online references that are applicable to the work order.

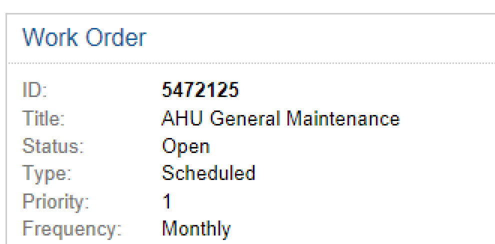
Basic, commonly referenced information is displayed as a series of virtual cards on the left side of the work order details. Editable cards are highlighted in blue when moused over. Clicking on a card opens a window which allows users to edit this information.



1. The **Go Back** button returns to the previous screen.

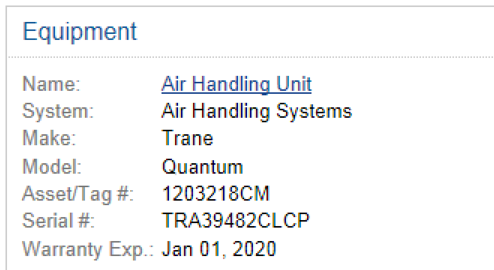


2. The Work Order card displays basic information about the work order: ID, Title, Status, Type, Priority, and Frequency.

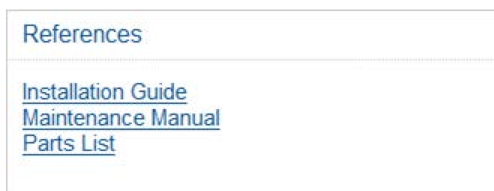


3. The Location card indicates the location where the work is to take place: Property, Building, Floor, and Suite.

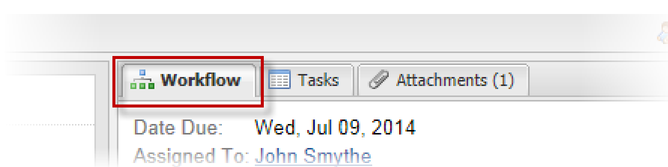
4. The Equipment card displays general information concerning the equipment on which the work is to be performed: Name, System, Make, Model, Asset/Tag #, Serial #, and Warranty Expiry.
   - Users can click on the equipment's name to view additional information on the Equipment Details screen.



5. The References card contains external links (hyperlinks/URLs) related to the equipment being worked on, such as installation guides or maintenance manuals.
   - Clicking on a link will open the URL in a new browser window.

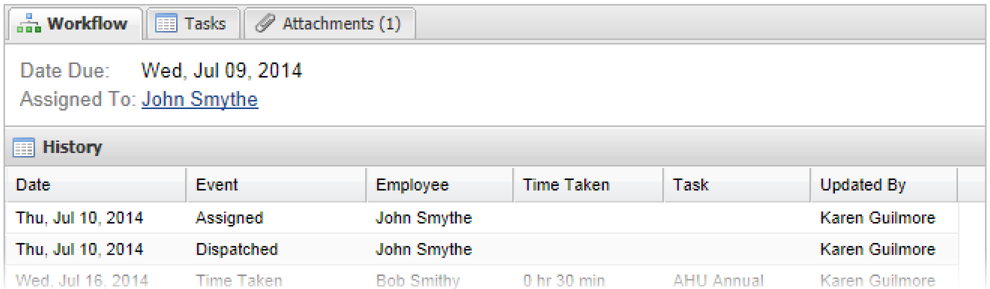


6. The Workflow, Tasks and Attachments tabs. Additional details for each tab are provided below.

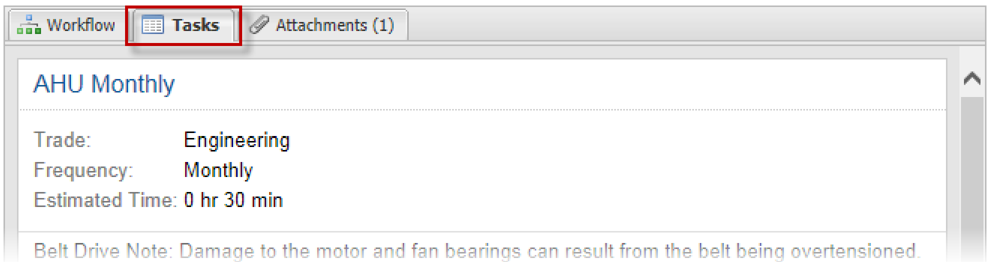


   - The Workflow tab is displayed by default. It displays the following information: Date Due, Assigned To, and the work order's History.
     - Clicking on the name displayed in the Assigned To field displays a popup with the assignee's contact information.
     - The history section lists events in chronological order.

- Notes appended to Cancelled and Closed history events can be edited by double-clicking on the entry.

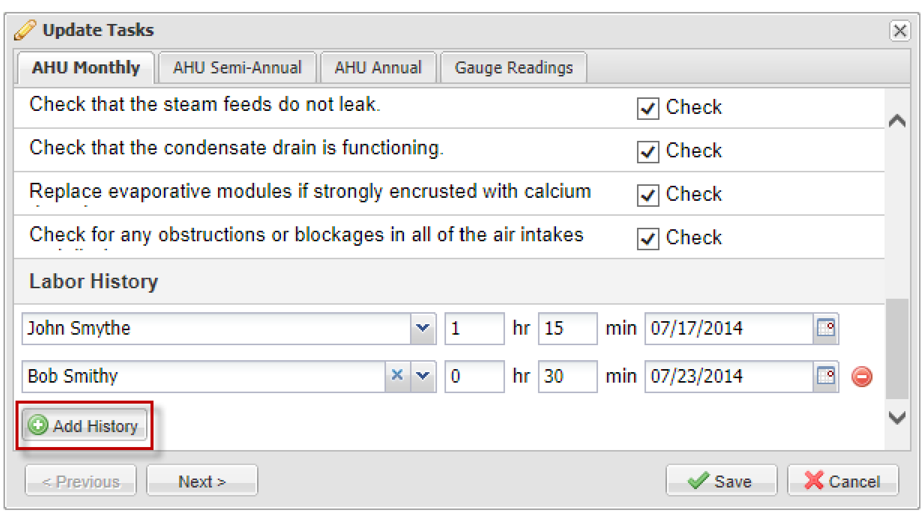


- The Tasks tab shows a list of tasks which need to be performed.

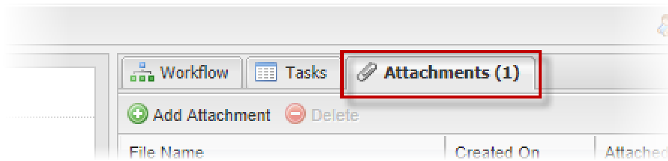


  - Each task is displayed as a separate virtual card.
  - Clicking on a task card opens the Update Tasks interface, allowing the user to input labor history information (time taken to work on the task) by clicking the **Add History** button.
  - Users can add time taken for multiple employees as needed by clicking on the **Add History** button.

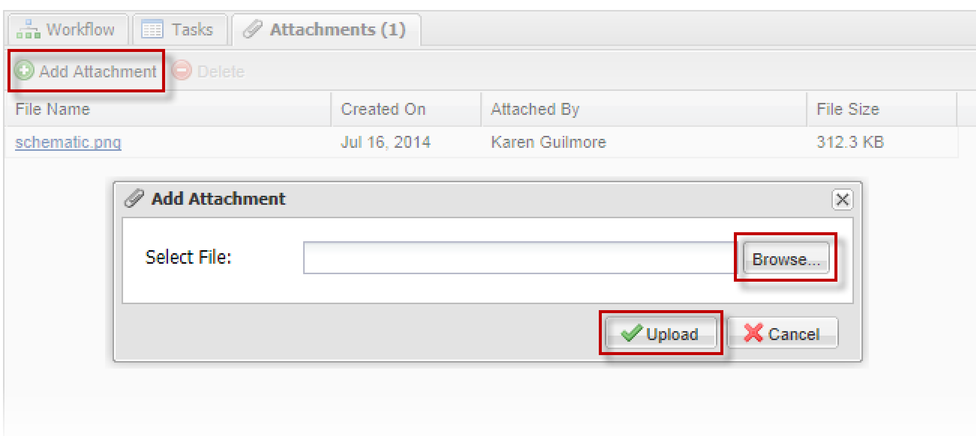
! Adding to the work history using this method **does not** mark the work order as completed; see *Completing PM Work Orders* (p. 87) for detailed information on completing work orders.



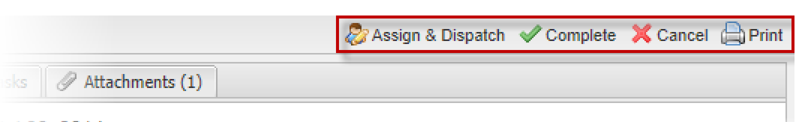
- The Attachments tab displays a list of any files (such as MS Word documents, pictures or PDF files).



  - Click on a file name to download it; if the file is in a format which can be displayed within a web browser, then it will be displayed in a separate browser window.
  - Users can remove an attachment by selecting an attachment and clicking **Delete**.
  - Users can upload an attachment by clicking **Add Attachment**.
    - In the window that opens, click **Browse…**
    - Select the file to upload in the file selection window that is displayed and click **Open**.
    - In the Add Attachment window, click **Upload** to complete the process.



7. The **Assign & Dispatch**, **Complete**, **Cancel**, and **Print** buttons are briefly explained below.



- Clicking the **Assign & Dispatch** button opens the Assign & Dispatch window, allowing users to assign (if currently unassigned) or re-assign and dispatch the work order.

    - See *Assign and Dispatch Work Orders* (p. 79) for additional details.
- Click the **Complete** button to mark the work order as completed.
    - In the window that opens, users will have the opportunity to enter any previously unrecorded information, such as task completion or gauge readings.
    - See *Completing PM Work Orders* (p. 87) for more detailed information.
- The **Cancel** button opens the Cancel Work Order window, allowing users to cancel a work order.
    - See *Cancelling PM Work Orders* (p. 96) for more information.
- Clicking the **Print** button allows users to print a copy of the work order.
    - Printed work orders can be used to complete work in situations where the assignee does not have direct access to the Internet; the information filled out in the form will need to be manually input in Axis Control Panel afterwards to properly document the work.

Assign and Dispatch Work Orders

Work orders must be assigned and dispatched in order for work to begin. On demand work orders can be assigned when they are created. Scheduled work orders can be assigned when the Schedule is created. Work orders that are not assigned can be assigned from the work order lists.

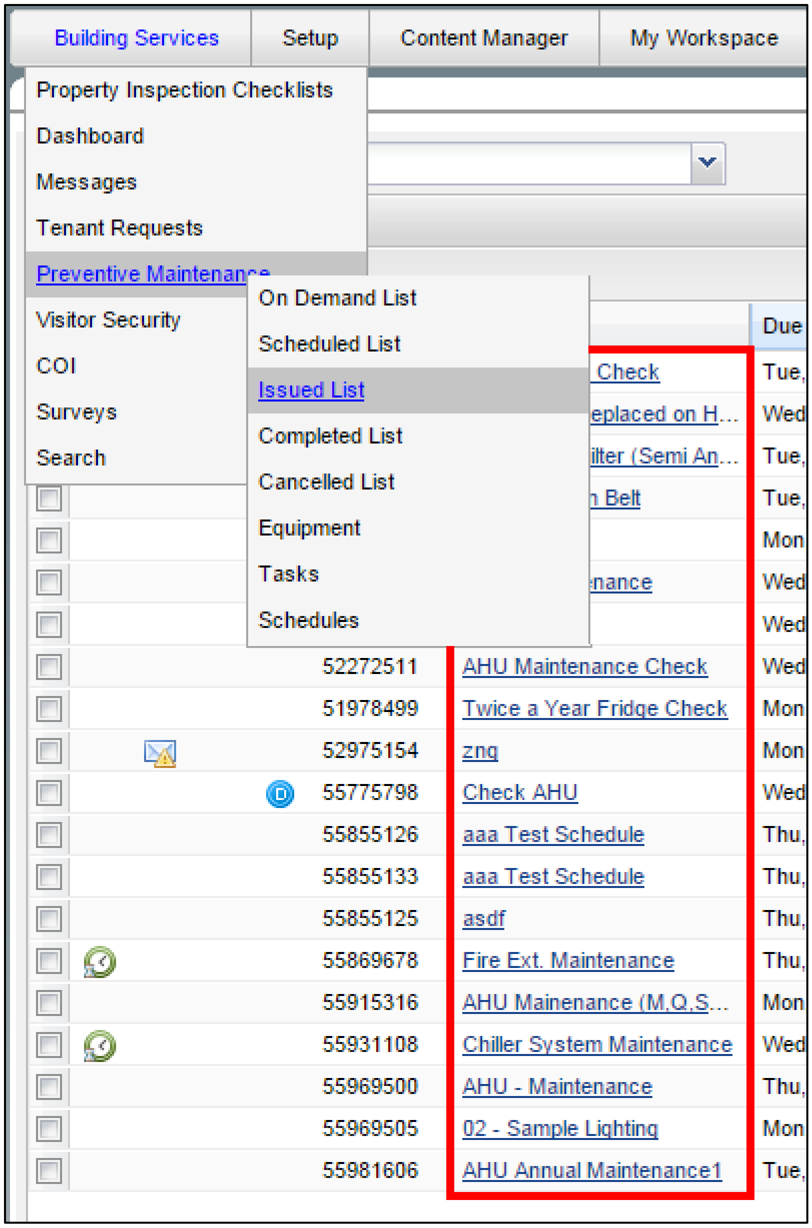
> *i* Users can also reassign and/or reissue work orders by following the directions below.

Work orders that have already been assigned and dispatched can be found in the Issued List.

Unless users want to dispatch a work order early, work orders that have been assigned to an employee or vendor will be automatically dispatched if automatic dispatching has been enabled.

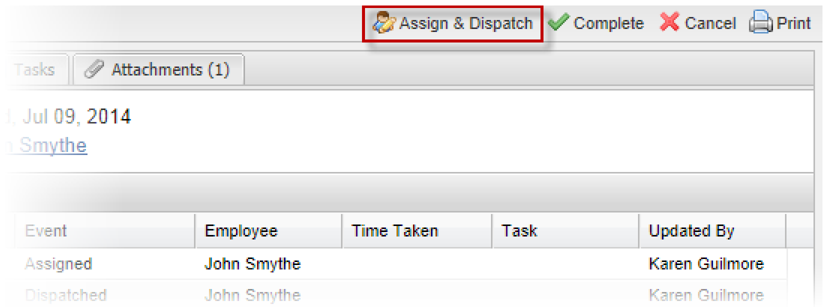
To assign and dispatch a work order, follow the steps outlined below:

1. Locate the work order that needs to be assigned and/or dispatched. Users can use the list filters to assist with the search.
2. Click on the work order's title to open the Work Order Details screen.

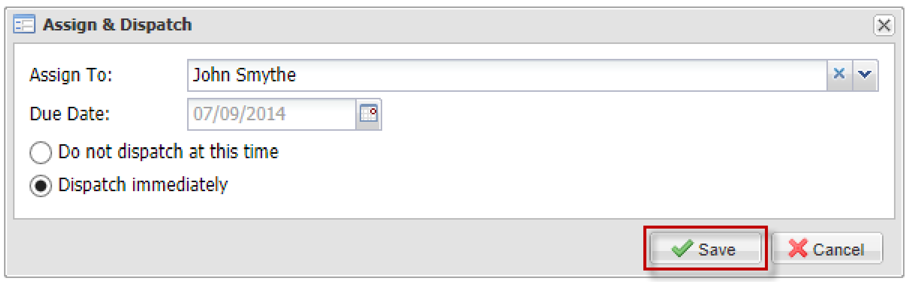


3. In the top-right corner of the details screen, click **Assign & Dispatch**.

> *i* The exact options available to users in the Assign & Dispatch interface will vary depending on the number and type of work orders selected.



4. In the window that opens, use the Assign To drop-down list to assign (if currently unassigned) or re-assign the work order.
5. Select "Do not dispatch at this time" if the work order only needs to be assigned, but not dispatched.
6. Select "Dispatch immediately" if the work order needs to be dispatched.
7. Click **Save** to save your changes. This will also dispatch the work order if "Dispatch immediately" was selected.

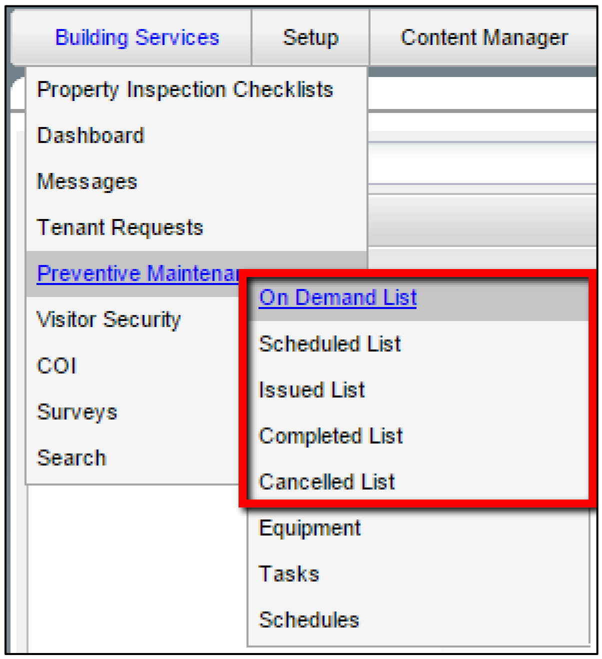


Creating On Demand Work Orders

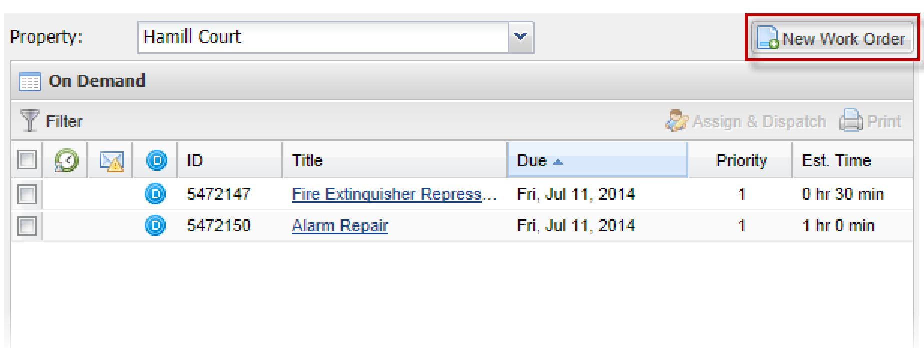
Users can create on demand work orders manually, or from a completed work order.

Manual Creation of On Demand Work Orders

1. Log into the Axis Control Panel at http://cp.axisportal.com, hover over **Building Services**, hover over **Preventive Maintenance**, then select **On Demand List**.

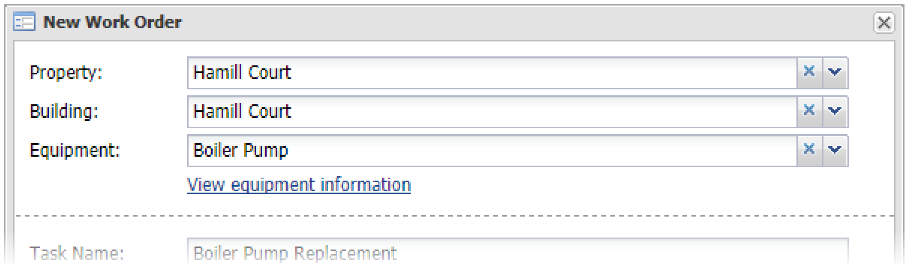


2. To the top-right of the list, click **New Work Order**.

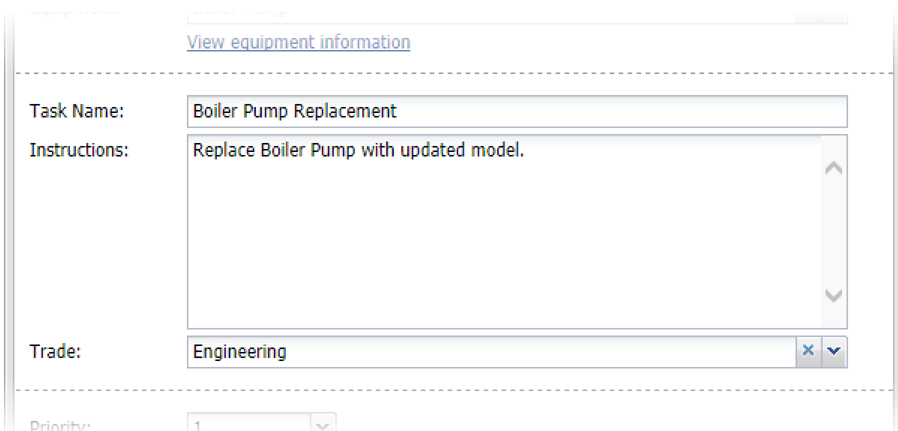


3. A New Work Order window is displayed.

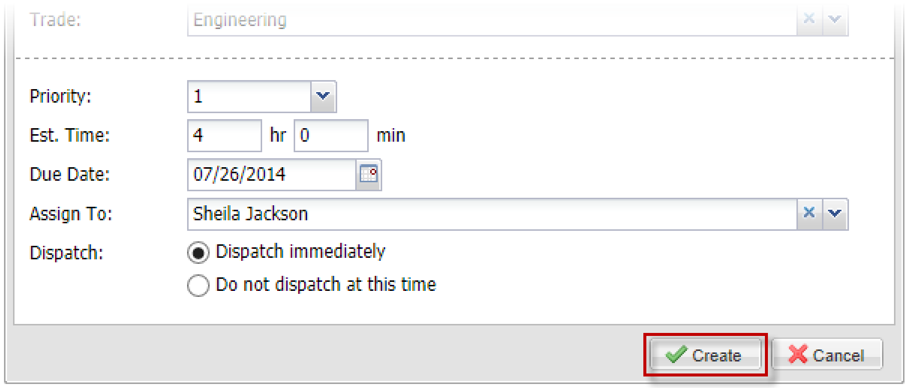
4. Select the Property, Building, and Equipment the work order involves. If the equipment is still under warranty, a warning will be shown.



5. Enter a name for the task, and any additional instructions to clarify what work needs to be done.
6. Select the applicable trade using the Trade drop-down list.



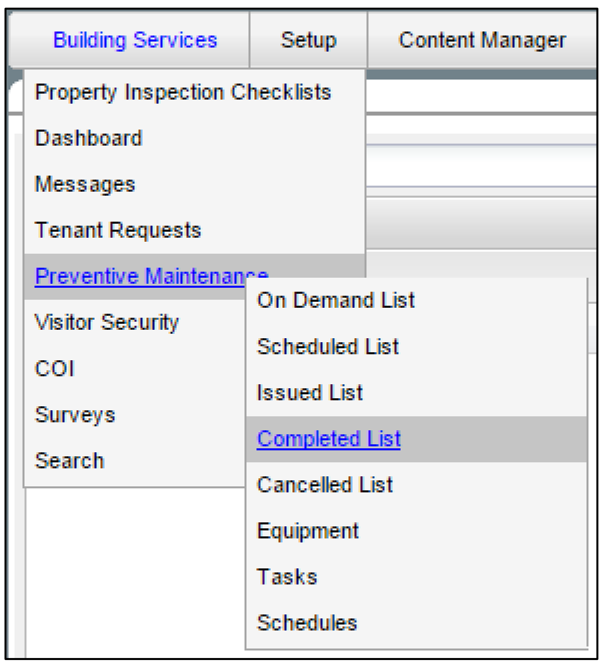
7. Select a priority level for the work order using the provided drop-down list.
8. Click the Estimated Time fields and select the time it should take to complete the work order.
9. By default, the Due Date field is set to today's date. If the date needs to be changed, click the Due Date field and enter the date, or click  and select the date from the calendar interface.
10. Click the Assign To field and select an employee.
    - Users can also leave this field blank and assign the work order once it is generated and displayed in the On Demand List.
11. If the work order has not been assigned, the only dispatch option available is "Do not dispatch at this time". If the work order has been assigned, then "Dispatch immediately" is the default option, but users can instead select "Do not dispatch at this time" and issue the work order at a later date.
12. Click **Create**.



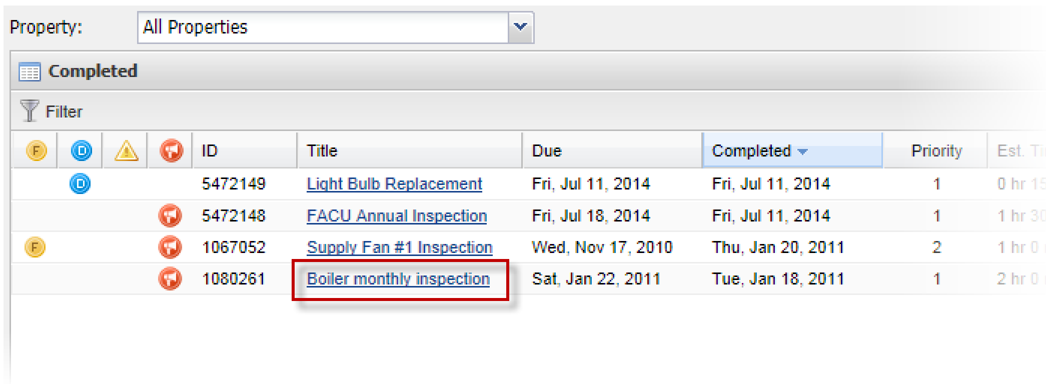
13. Users will see your work order displayed in the On Demand List. Users can now assign and issue it as they would with a scheduled work order.

Creating On Demand Work Orders from a Completed Work Order

1. Log into the Axis Control Panel at http://cp.axisportal.com, hover over **Building Services**, hover over **Preventive Maintenance**, then select **Completed List**.

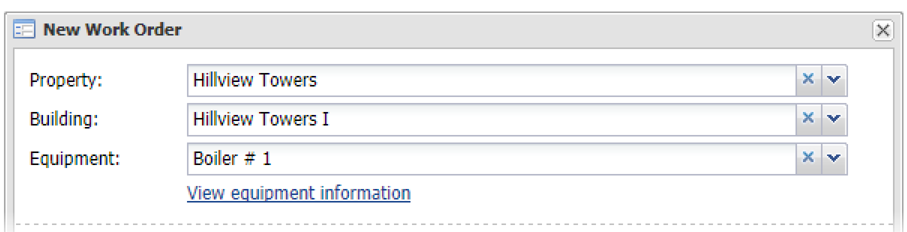


2. Locate the work order in the list, then click on the title to open the Work Order Details screen.



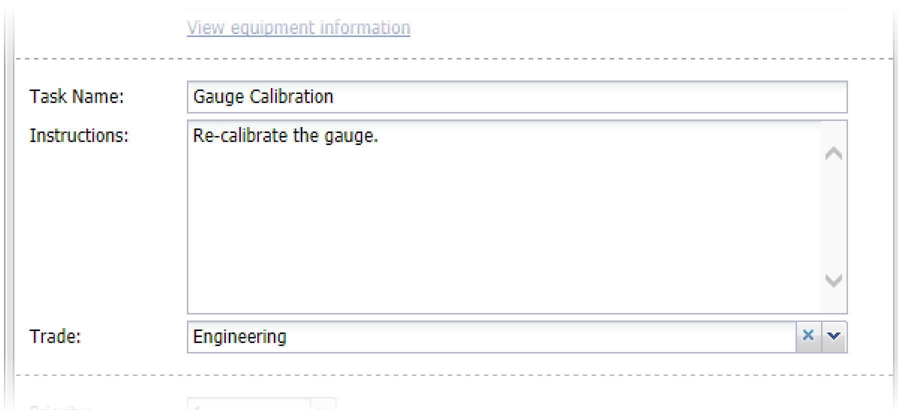
3. In the Work Order Details screen, click **Create Work Order** at the top-right. This will open the New Work Order popup.

4. In the New Work Order popup window, some information such as the equipment and location are auto-filled. Users can edit this information as needed.

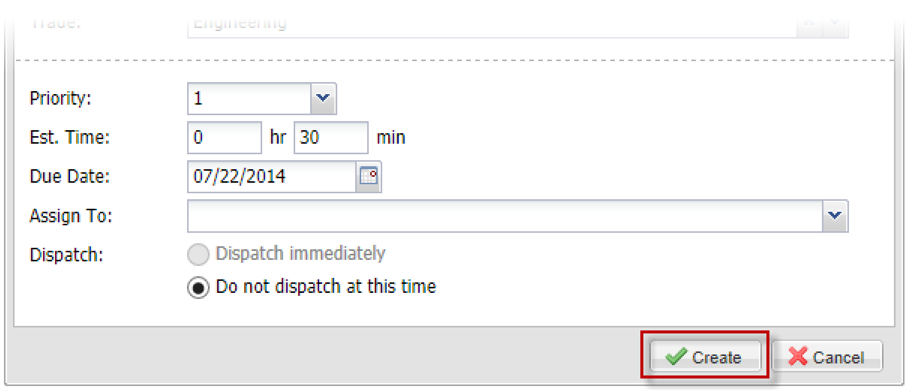


5. The task name is also auto-filled. Edit the task name if required, then provide any instructions which should accompany the work order.

6. Select the applicable trade using the drop-down menu provided; by default, the trade that this work order was based on is used by default.



7. Enter a priority and due date.
8. Click the Estimated Time fields and select the time it should take to complete the work order.
9. By default, the Due Date field is set to today's date. If the date needs to be changed, click the Due Date field and enter the date, or click and select the date from the calendar interface.
10. Click the Assign To field and select an employee.
    - Users can also leave this field blank and assign the work order once it is generated and displayed in the On Demand List.
11. If the work order has not been assigned, the only dispatch option available is "Do not dispatch at this time". If the work order has been assigned, then "Dispatch immediately" is the default option, but users can instead select "Do not dispatch at this time" and issue the work order at a later date.
12. Click **Create**.



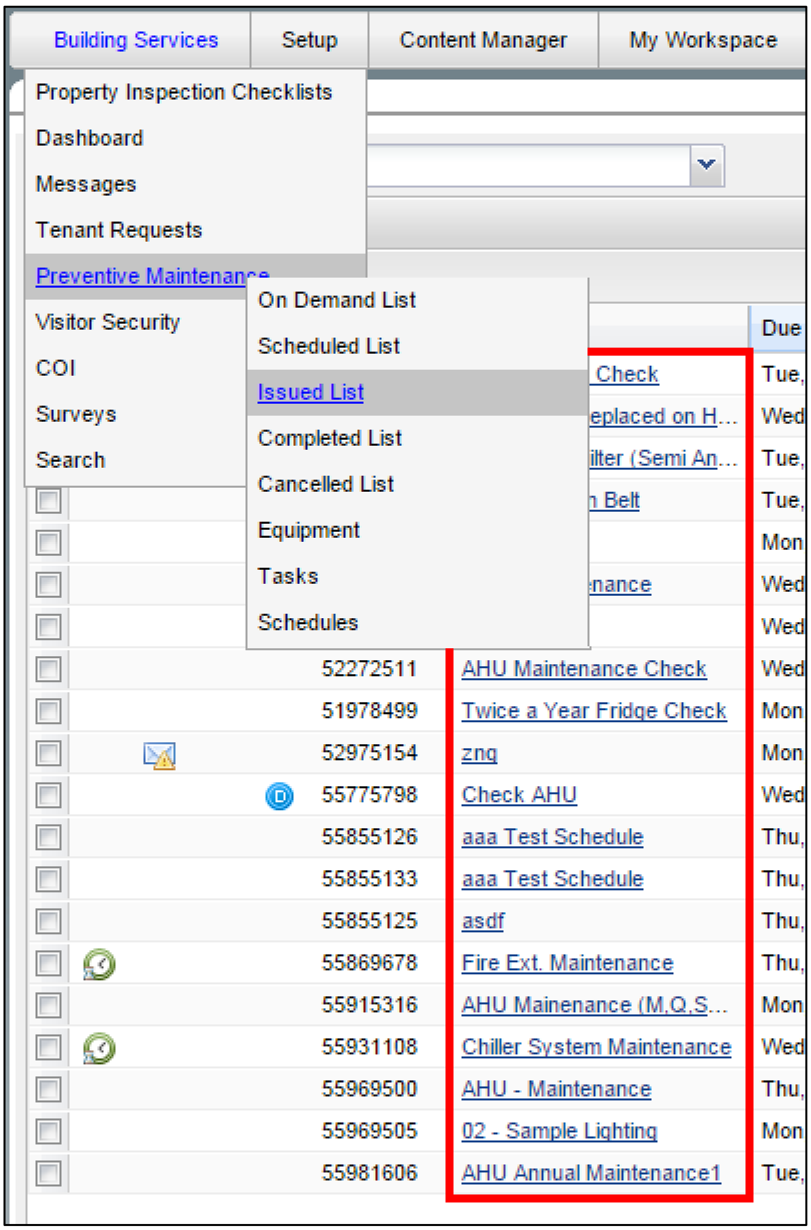
13. Users will see their work order displayed in the On Demand List. Users can now assign and issue it as they would with a scheduled work order.

Completing PM Work Orders

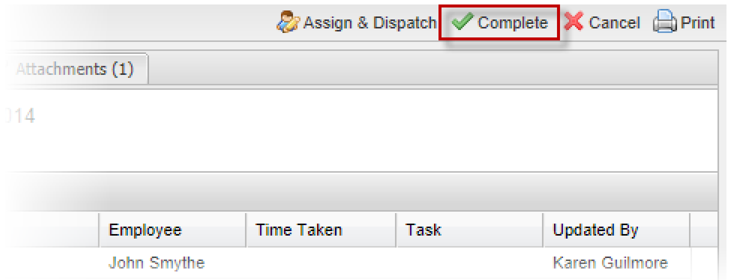
Engineers may update and complete work orders from the field using a handheld device or by following the steps described below.

> *i* Work orders can only be completed if they are in the Issued List.

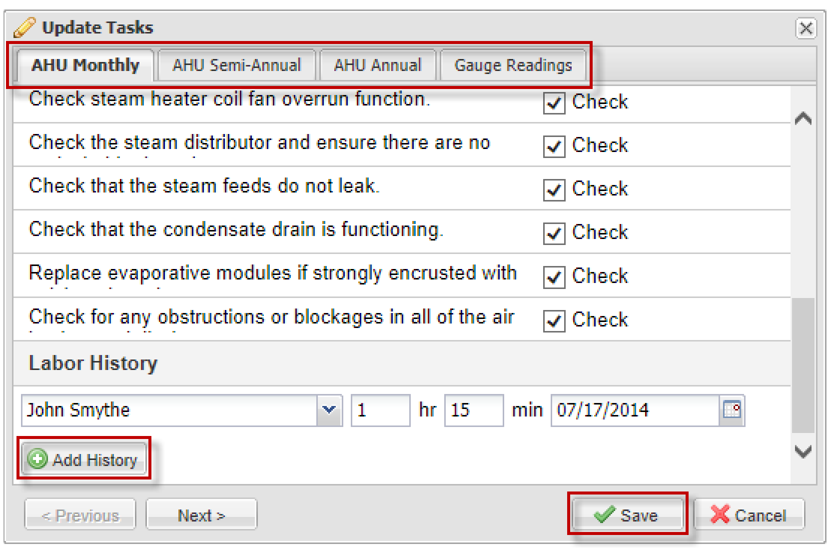
1. Locate the work order that needs to be completed. Users can use the list filters to assist with the search.
2. Click on the work order's title to open the Work Order Details screen.



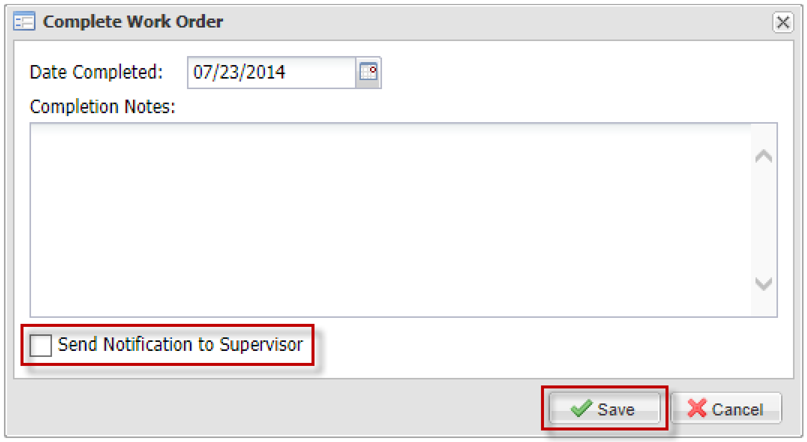
3. Near the top-right corner of the Work Order Details screen, click **Complete**.



4. In the window that opens, users will have the opportunity to enter any previously unrecorded information, such as task completion or gauge readings.
5. Users can also add to the labor history by clicking **Add History**. Users can use this section to track the time taken by multiple people by creating a separate entry for each person.
6. If there are multiple tasks, users can use the **Previous** or **Next** buttons to update information related to each task, or click on the tabs at the top of the screen.
    - Each task has its own labor history section.
7. Click **Save** to save any updates provided.



8. In the Complete Work Order screen that is displayed next, enter any notes concerning the completion of the work order
9. Users can also indicate if a supervisor should be notified. See *The Notify Supervisor Flag* (p. 90) for additional details.
10. Click **Save** once finished. The completed work order is moved to the Completed List.

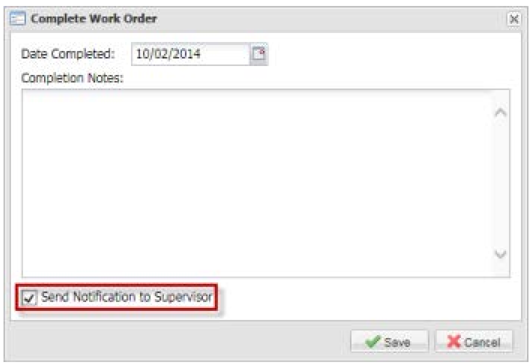

Complete Work Order
Date Completed:
07/23/2014
Completion Notes:
Send Notification to Supervisor
Save
Cancel

The Notify Supervisor Flag

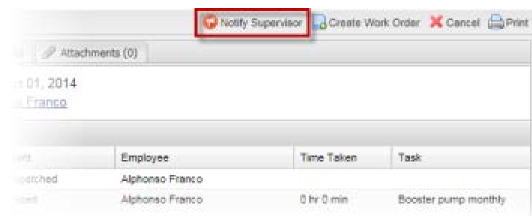
Employees that have the PM Notify Call Attention option selected in their employee profile will receive an email whenever a work order has the Notify Supervisor flag added to it (contact Axis Portal Team for assistance with setting up PM Notify Call Attention at AxisSupport@cbre.com).

During the last step of completing a work order, if users wish to have a notification sent to a supervisor concerning the work order, place a checkmark beside **Send Notification to Supervisor** (Example 1). Users can also mark a completed work order as requiring a supervisor's attention by opening the work order details and clicking the **Notify Supervisor** button near the top-right corner of the screen (Example 2).

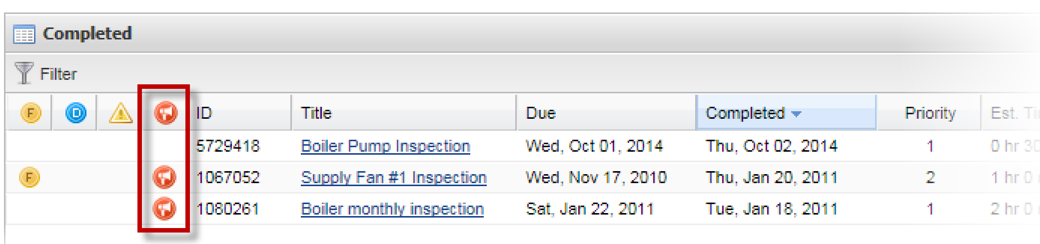
Example 1



Example 2



Selecting **Send Notification to Supervisor** will send an email notification informing the supervisor that the work order requires review. Work orders that have a notification sent to a supervisor can be found in the Completed List and are tagged with a Notify Supervisor icon (), as shown below.



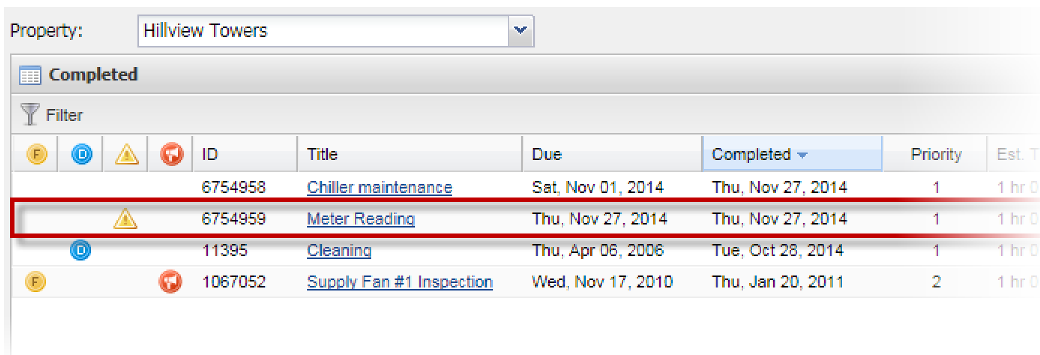
When a supervisor views the work order's details (by clicking on the title or double-clicking on a row), after completing their review and making any necessary updates, the supervisor can mark the work order as reviewed by clicking the **Mark as Reviewed** button near the top-right corner of the screen.

i If users clicked **Mark as Reviewed** in error, users can undo this action by clicking the button again (the button name changes to Notify Supervisor).

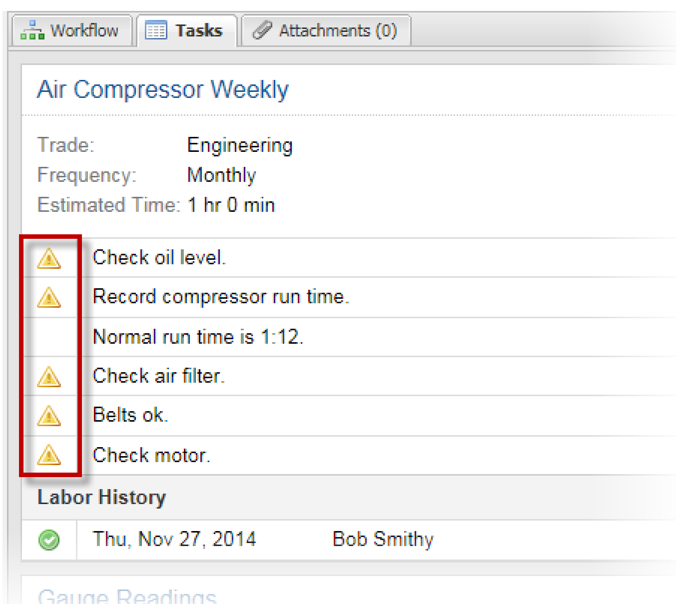
Missing Values

Employees that have the PM Notify Missing Values option in their employee profile will receive an email whenever a work order is completed with missing values (contact Axis Portal Team for assistance setting up PM Notify Missing Values at AxisSupport@cbre.com).

When a work order is completed without filling out all task-related fields, such as gauge readings or task lines, the completed work order will have the Missing Values flag () in the Completed List.

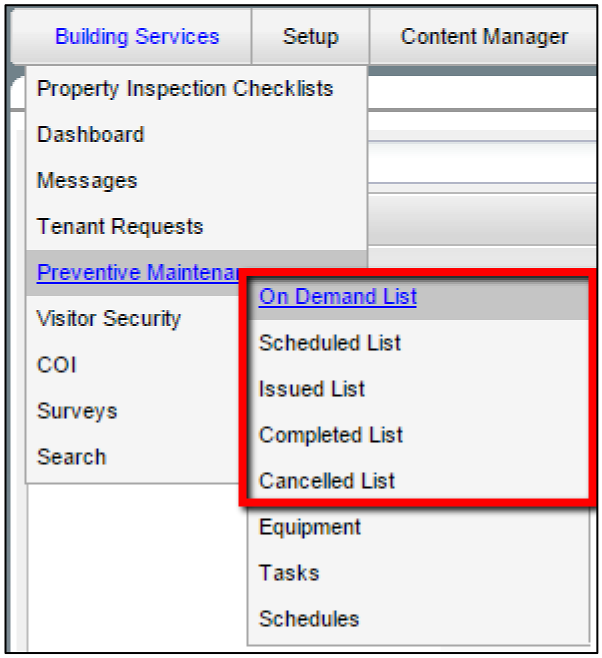


To remove this flag, all missing values must be entered under the work order's Tasks tab; additional details on updating tasks can be found in *Work Order Details Overview* (p. 74). Each task line, gauge, or similar missing value is flagged with the same icon (), and must be properly filled in to remove the Missing Values flag.



Finding PM Work Orders

The PM work order list is accessed from the Home menu and clicking on the PM work order lists located in the Preventive Maintenance folder.



There are a variety of methods users can use to sort, filter, or search through the PM work order lists.

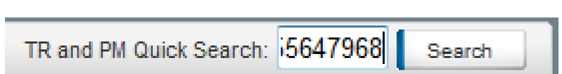
Using Work Order List Filters

Users can use the various methods outlined in *List Controls, Customization, and Filtering* (p. 68).

Searching for Work Orders (Quick Search)

If users know the ID number of the work order, they can use the quick search.

1. Click on the quick search field in the top-right corner of the screen.
2. Enter the ID number of the work order.
3. Click **Search**. The work order is displayed.



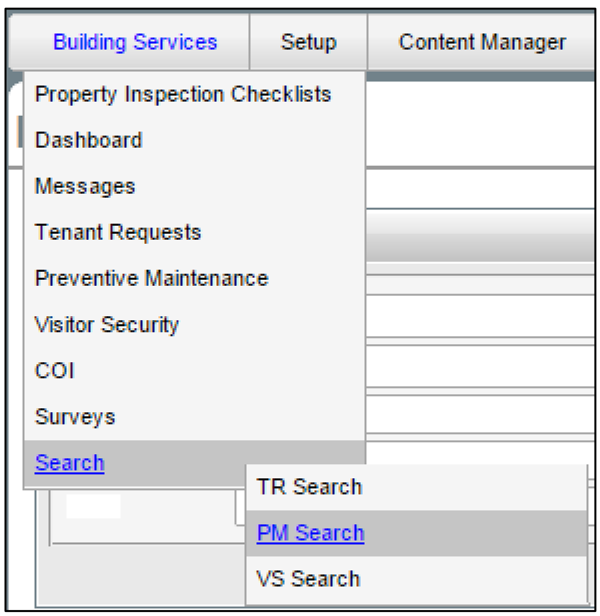
i ID numbers are only assigned to work orders that have been issued.

Searching for Work Orders (Advanced Search)

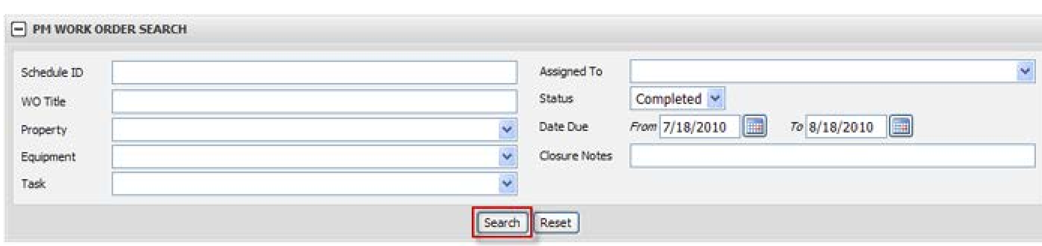
i Users can only search for completed or cancelled work orders using the advanced search feature.

If users do not know the ID number for the work order, they can use the Advanced Search.

1. Log into the Axis Control Panel at http://cp.axisportal.com, hover over **Building Services**, hover over **Search**, then select **PM Search**.



3. Enter any available information about the work order.
4. Click **Search**. The work order is displayed.



Cancelling PM Work Orders

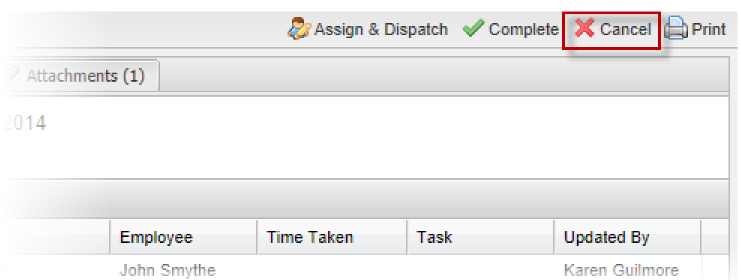
Auto-Cancelled Work Orders

- Work orders are automatically cancelled when the next work order from the schedule is due.
- When work orders are created from a schedule, a cancellation date is determined for each work order, which is the due date plus one period. For example, if a work order is due on January 1, it appears in the list on December 15, because by default, the system displays it 14 days in advance. If it is not completed by February 1 when the next one is due to be completed, the system auto-cancels the one dated January 1.
- Automatic cancellations are processed overnight.
- Cancelled work orders are listed in the Cancelled List.

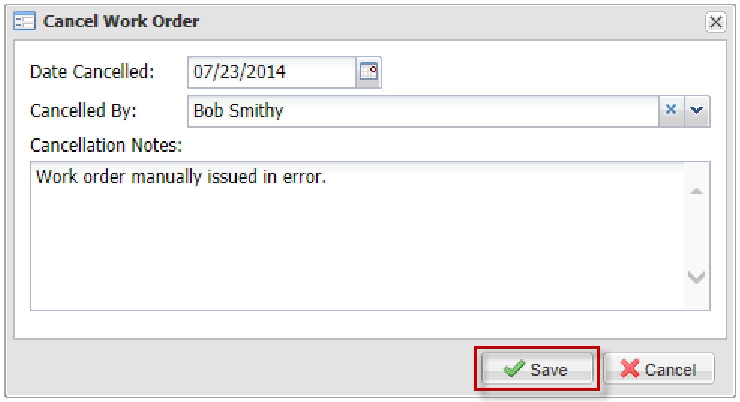
Cancelling a Work Order

Work Orders that are in the On Demand, Scheduled, Issued and Completed lists can be cancelled.

1. Open the desired work order. See *Finding PM Work Orders* (p. 92) for more information.
2. Click the **Cancel** button. This will open the Cancel Work Order window.



3. In the Cancel Work Order window, enter the following information:
    - Date Cancelled (current date is the default)
    - Cancelled By
    - Cancellation notes (the reason the work order was cancelled).



4. Once finished, click **Save** to cancel the work order. The work order is moved to the Cancelled list.