Angus AnyWhere™

Reports User Guide

AUGUST 2012

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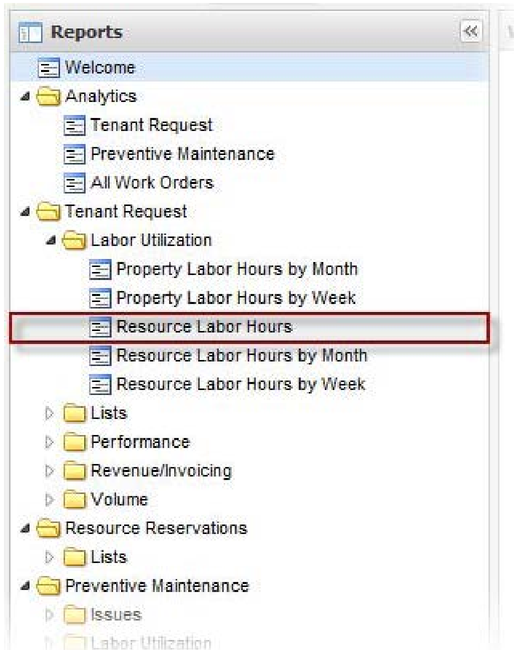
About Reports

Reports from the Angus AnyWhere™ system provide management with fast, fact-based information to enable better decision-making. They can be run at any time and for any duration and can display any level of detail that may be required.

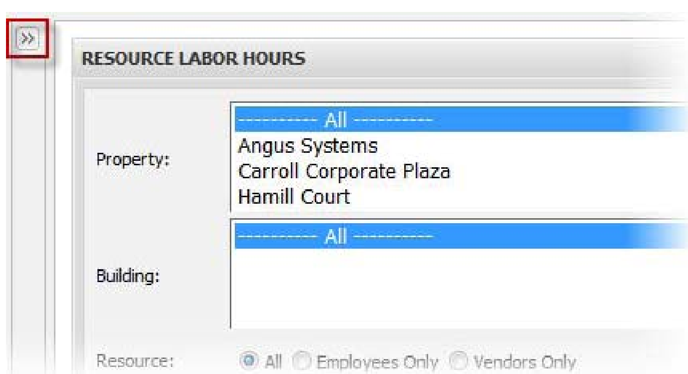
i	When navigating within reports, some reports contain links which will open another window, displaying more detailed information. To return to the main report window, click the X inside the top-right corner of the screen.

Generating a Report

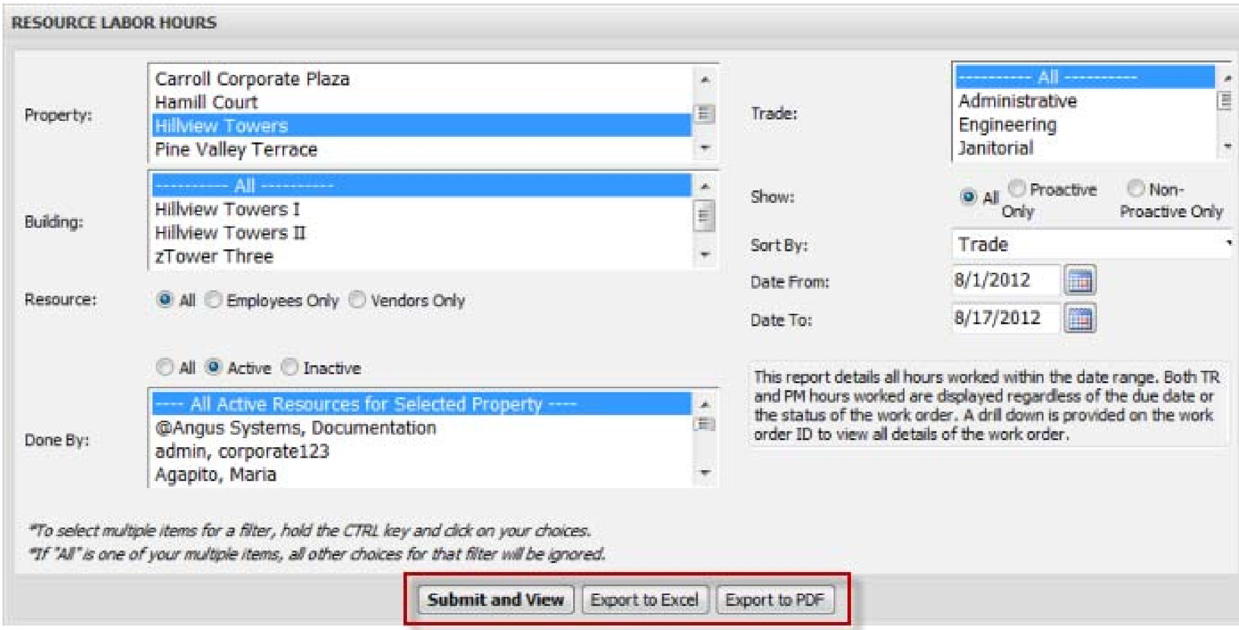
1. Click Reports > Building Services Reports.
2. In the side bar, click on folders to expand and collapse them. Locate the report you want to generate and click on it.



3. The side bar will collapse, providing more space to display the report configuration screen. To expand it again, click the expand arrow (») near the top-right corner of the screen, as shown below.



4. Using the controls provided, configure the report so it will display the specific information you require. The exact configuration process varies by report type.



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- To select more than one item in a field, press the Ctrl key on your keyboard and click the desired items.
- By default, the Date From field displays the first day of the current month and the Date To field displays today's date. To select alternate dates, either click the calendar icon, or delete the contents of the date fields and enter new dates.

5. Click **Submit and View** to generate a report in HTML format, **Export to Excel** to generate the report as an Excel spreadsheet, or **Export to PDF** to create the report in PDF format. The report will appear in a new browser window.

    - If you select **Submit and View**, the report will appear in a new browser window.
    - If you select **Export to Excel** or **Export to PDF**, a notification bar will appear at the bottom of the screen, allowing you to open the file to view it, or to save it in your browser's download folder.
    - For more information on exporting to other formats, see Exporting Reports.

Exporting Reports

> *i* Popup blockers enabled in your web browser may prevent exporting reports, particularly the "Export to Excel" option; see the Popup Blockers topic for more information.

Reports can be exported into two formats for distribution or record-keeping.

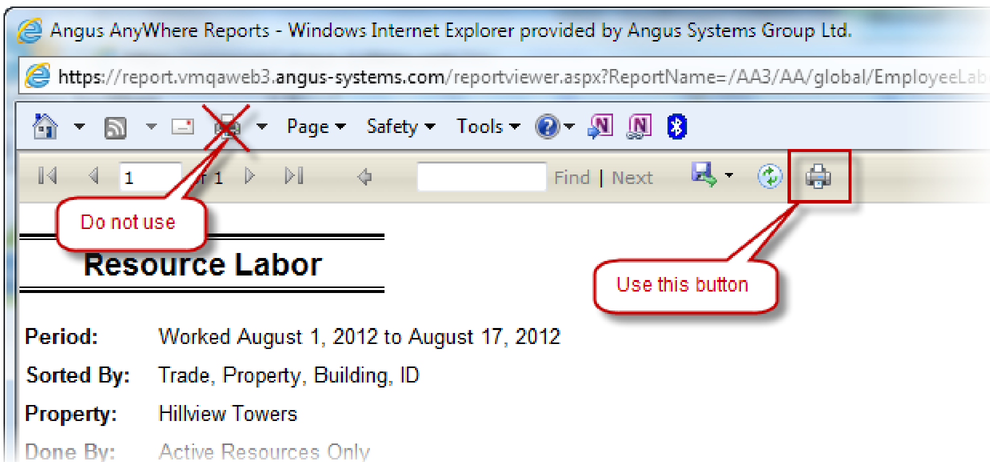
Format	Purpose
PDF	• Easy viewing and distribution. • Creates a report in Adobe's Portable Document Format, visit http://www.adobe.com/products/acrobat/main.html for more information.
Excel	Creates a report in Excel format. IMPORTANT NOTE: If Internet Explorer is not set up to download files automatically, you may encounter a warning message in a yellow bar across the top of your browser widow. In order to enable automatic downloading, open Internet Explorer and complete the following: 1. Select Internet Options from the Tools menu. 2. Select the Security tab. 3. Click the Internet icon in the Web Content Zone section. 4. Click the Custom Level button. 5. Scroll to the Downloads section. 6. Click the Enable radio button to select Automatic Prompting for File Downloads. 7. Click OK. 8. Click OK again to close the Internet Options window.

Once a report is generated, it can be exported to PDF format (exporting to excel can only be done form the report generation screen; see Generating a Report). To export the report to PDF while viewing it, click the **Export** button (), and select PDF from the menu that appears.

A notification bar will appear at the bottom of the screen, allowing you to open the file to view it, or to save it in your browser's download folder.

Printing Reports

Once report is generated, it can be printed for viewing and distribution. To print a report, click the print icon, as shown below (do not use the standard print button in Internet Explorer).



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- This printing functionality is supported by an ActiveX control distributed by Microsoft. The first time the print icon is clicked, Windows will prompt you to install ActiveX control Microsoft SQL Server 2000 Reporting Services from Microsoft Corporation. Some operating environments do not allow for the installation of ActiveX content. Should you encounter any difficulties during installation, please contact your IT Administrator for assistance.
- You can also export the report as a PDF, then print the PDF version of the document. Printing from the PDF version sometimes yields a more attractive appearance. See Exporting Reports and Generating a Report for additional information.

Tenant Request

Labor Utilization

Name	Details
Property Labor Hours by Month	This report summarizes all hours worked during each month for the selected calendar year. Both TR and PM hours worked are displayed regardless of the due date or the status of the work orders. The data is grouped first by property then detailed by resource. A drill-down is provided on the property to view the details of the work done for that property.
Property Labor Hours by Week	This report summarizes all hours worked during each calendar week during the last 3 months. Both TR and PM hours worked are displayed regardless of the due date or the status of the work orders. The data is grouped first by property then detailed by resource. A drill-down is provided on the property to view the details of the work done for that property.
Resource Labor Hours	This report details all hours worked within the date range. Both TR and PM hours worked are displayed regardless of the due date or the status of the work order. A drill-down is provided on the work order ID to view all details of the work order.
Resource Labor Hours by Month	This report summarizes all hours worked during each month for the selected calendar year. Both TR and PM hours worked are displayed regardless of the due date or the status of the work orders. The data is grouped first by resource then detailed by property. A drill-down is provided on the resource name to view the details of that resource's time taken.
Resource Labor Hours by Week	This report summarizes all hours worked during each calendar week during the last 3 months. Both TR and PM hours worked are displayed regardless of the due date or the status of the work orders. The data is grouped first by resource then detailed by property. A drill-down is provided on the resource name to view the details of that resource's time taken.

Lists

Name	Details
Closed TR Work Orders	This report shows all work orders generated from tenant requests where the date closed is within the date range and the status is Closed. Closed means that a work order has been assigned and all services provided have been entered into that work order. A drill-down is provided on the ID to view all details of the work order.

Contact List	This report shows a list of tenant contacts and their E-mail address and phone number. The report is grouped by Property, Building, then Floor. **Note:** The Excel version of this report provides greater contact detail.
Employee List	This report shows a list of employees including their default property, role, username, availability, devices, and device addresses. Checking the Show Details box displays the employee's phone, CC email address, subscriptions, and preferences.
Recurring TR Work Orders	This report shows all work orders generated from Tenant Requests with a recurring schedule where the Date Due is within the date range. A drill-down is provided on the ID to view all details of the work order. An additional drill-down is provided on the Schedule ID to view the details of the Schedule.
Service Schedules	This report lists the services provided to tenants and their costs. Choosing to sort by request type will show all services by property with any tenant overrides for each service. Choosing to sort by tenant will first show the default costs for all services then will show the tenants with their costs for all services.
Tenant List	This report shows a list of tenants and their associated ID, phone, and Lease number. Checking the Show Details box will display detailed contact, lease, and location information.
TR Work Orders	This report shows all work orders generated from tenant requests where the due date is within the date range. It also includes any tenant requests that have not yet been created as work orders. Checking the Show Details box displays more information about the work order including tenant contact information. Checking the Show Services box will display any services provided and billing details. Checking the Show Older Than box displays only new, open, and delayed work orders that are overdue by the number of days entered in the box next to it. A drill-down is provided on the ID to view all details of the work order.
TR Work Orders -- Basic	This report shows all work orders generated from tenant requests where the due date is within the date range. It also includes any tenant requests that have not yet been created as work orders. The list has been simplified to show one work order or tenant request per line for a condensed view. A drill-down is provided on the ID to view all details of the work order.
TR Schedule List	This report provides a list of current TR schedules along with the frequency and estimated completion time of that schedule. A drill-down is provided on the schedule ID to see all details of the schedule.

Vendor List	This report shows a list of vendors including their address, phone, fax, availability, and after hours contact information. Checking the Show Details box displays the TR and PM dispatch names, numbers, devices, and addresses. Sorting by Vendor will show the available properties and default property in the details. Checking the Show Details box displays the primary, secondary, and after hours contacts.

Performance

Name	Details
Acceptance Time	This report shows acceptance time for TR work orders where the dispatch date is within the date range. The acceptance time is calculated as the elapsed time between the dispatch date and acceptance date. Cancelled requests are not included. A drill-down is provided on the ID to view all details of the work order.
Average Completion Time	This report shows the total and average business hours taken to complete TR work orders. Only work orders that have work completed dates within the date range are included in the calculations. Completion time is the difference between the date required and the date work was completed. Checking the Show Details box displays all work orders used in the calculation of the total and average completion times. A drill-down is provided on the ID to view all details of the work order.
Average Response Time	This report shows the average business hours taken to respond to TR work orders where the date required is within the date range. Response time is the difference between the date required and date work started. Checking the Show Details box displays all work orders used in the calculation of average response time. A drill-down is provided on the ID to view all details of the work order.

Employee Work Order Count	This report provides a count of both TR and PM work orders that have been Completed, Closed, Cancelled and Auto-Cancelled with the Estimated Time and Time Taken of the Work Orders grouped by Employee. Completed = total number of work orders where an employee is associated with the last work completed work order history. • Assigned = total number of work orders that an employee was assigned to at the time the report was run. • Worked On = total number of work orders where an employee has any work order history that time taken was recorded. • Cancelled = total number of cancelled work orders that an employee recorded a work started history or was assigned to at the time of cancellation. • Auto-Cancelled = total number of work orders that were auto-cancelled. • Cancelled By = total number of cancelled work orders that the employee cancelled. • Unassigned = total number of work orders that are not assigned.
Response and Completion Time Trending	This report provides a summary of the average business hours taken to respond and complete TR work orders where the date required is within the date range. The first section of the report shows average response and completion times for the past 12 months. The second section of the report shows average response and completion times for the past 12 weeks. Response time is the difference between the date required and date responded. Date responded is the date of the first in progress, delayed, or completed action. Completion time is the difference between the date required and the date work was completed. A drill-down is provided on the number of Requests to view the details of the work orders. The drill-down is only available when both Completion and Response Time is greater than 0.
Tenant Average Completion Time	This report shows the average business hours taken to complete TR work orders for request types. Only work orders that have work completed dates within the date range are included in the calculations. The variation from the property mean is based on the average completion time for that request type for the entire property. Completion time is the difference between the date required and the date work was completed.
Tenant Average Response Time	This report shows the average business hours taken to respond to TR work orders for request types where the date required is within the date range. Only work orders with response dates are included in the calculations. The variation from the property mean is based on the average response time for that request type for the entire property. Response time is the difference between the date required and date responded. Date responded is the date of the first in progress, delayed, or work completed action.

Revenue/Invoicing

Name	Details
Billable Hours	This report summarizes the work done as billable and non-billable hours. The hours worked are within the date range, regardless of the current status of the work order. Please note that the reports in the Tenant Request Billing section showing the Tenant Radio Button are defaulted to “All”.
Billing Analysis	This report shows billable services provided that have been verified within the date range. The services are grouped by the month in which they were closed. A drill-down is provided on the Work Order ID to view all details of the work order. Please note that the reports in the Tenant Request Billing section showing the Tenant Radio Button are defaulted to “All”.
Services Provided	This report provides a breakdown of the services provided per work order closed within the date range. Quantity, billable, and non-billable totals are summarized. A drill-down is provided on the work order ID to view all details of the work order. Please note that the reports in the Tenant Request Billing section showing the Tenant Radio Button are defaulted to “All”.
Services Provided Summary	This report summarizes which months during one calendar year services were provided for closed work orders. Choosing the Billing Summary shows billable and non-billable totals per month. Choosing the Unit Summary shows how many of each services was provided in each month. Clicking on a month or total header drills down to the Services Provided report to provide a detailed view of the chosen month or entire year. Any filter parameters chosen here will be passed to the Services Provided report. Please note that the reports in the Tenant Request Billing section showing the Tenant Radio Button are defaulted to “All”.
Tenant Billing	This report is divided into three sections and shows the services that have been verified within the date range. The first section shows a Tenant Request Statement for each tenant. All histories and services provided and billable amounts are detailed for each tenant. The second section shows the Tenant Billing Summary and its graph. Only services provided and billable amounts are shown, grouped by tenant. The third section shows the Transaction Summary and its graph. Only services provided and billable amounts are shown, grouped by request type. A drill-down is provided on the work order ID to view all details of the work order. Please note that the reports in the Tenant Request Billing section showing the Tenant Radio Button are defaulted to “All”.

Volume

Name	Details
TR Work Orders Count	This report shows a count of TR work orders that have a status of open, delayed, cancelled, or work completed where the due dates are within the date range. The numbers also include a count of the new and open tenant requests that have not yet been created as work orders.
Request Count Summary	This report summarizes which months during one calendar year requests were received, regardless of current status.
Request Source	This report shows by which method requests were received within the date range. The sources are Email, Tenant Web, and Internal; the numbers for Email and Internal are broken down into tenant requested and employee requested. Cancelled requests are not included in the count.
Request Source Ownership	This report shows the owner of requests that were received within the date range. The numbers are grouped by their sources -- Email, Tenant Web, and Internal; the numbers for Email and Internal are broken down into tenant requested and employee requested. Cancelled requests are not included in the count.
Request Volume Analysis	This report summarizes during which hour of the day requests were received, regardless of current status. Choosing a time zone adjustment converts all received dates to the single time zone.

Resource Reservations

Lists

Name	Details
Reservation List	This report shows all approved reservations for the selected property where the date of the reservation is between the dates selected in the Date To and Date From parameters. All details of the reservation are shown, including special notes and any additional resources.
Resource Booking	This report shows all approved reservations for the selected property where the date of the reservation is between the Date From and Date To values specified. One page per resource is displayed.
Resource Utilisation	This report summarizes the duration that resources have been reserved where the date of the reservation is between the Date From and Date To values specified.
Resource Utilisation for Tenant	This report summarizes the duration that resources have been reserved where the date of the reservation is between the Date From and Date To values specified.

Preventive Maintenance

Issues

Name	Details
Gauge Readings - Issues	This report displays the corresponding number of gauge readings specified that are either outside the operational range or missing a value. Details of each gauge reading are displayed below the graph. Clicking on work order numbers will display work order details.

Labor Utilization

Name	Details
Engineering Effectiveness	This report categorizes all hours worked over the last 2 calendar weeks. PM hours are summarized as work due, completed, cancelled, overdue, completed current, and completed backlogged. A week is defined as Monday to Sunday.

Lists

Name	Details
Employee List	This report shows a list of employees including their default property, role, username, availability, devices, and device addresses. Checking the Show Details box displays the employee's phone, CC email address, subscriptions, and preferences.
Equipment List	This report shows a property''s equipment and its details, including the location, make, model, serial number, asset code, and warranty expiry of the equipment. Checking the Show Notes box will show any notes associated with the equipment

Gauge Readings	This report displays the specified number of past gauge readings for equipment. If Minimum and/or Maximum values have been configured for the gauge they are displayed on the graph. For readings above the max, or below the min, the points are red; for readings equal to the min or max, they are yellow; and for points within the min or max, they are green. A trending line for the readings is also displayed. Details of each gauge reading are displayed below the graph. Clicking on work order numbers will display the work order details.
PM Schedule List	This report provides a list of PM schedules for equipment maintenance along with the frequency and estimated completion time of the schedule. A drill-down is provided on the schedule ID to see all details of the schedule.
PM Work Orders	This report shows all work orders generated from Schedules and all on-demand work orders where the due date is within the date range. Checking the Show Details box displays more information about the work order including task and task line details. A drill-down is provided on the work order ID to view all details of the work order.
Task List	This report provides a list of tasks including the task's recommended period, estimated time, and trade. Checking the Show Details box displays the task lines.
Vendor List	This report shows a list of vendors including their address, phone, fax, availability, and after hours contact information. Checking the Show Details box displays the TR and PM dispatch names, numbers, devices, and addresses. Sorting by Vendor will show the available properties and default property in the details. Checking the Show Details box displays the primary, secondary, and after hours contacts.

Performance

Name	Details
Employee Work Order Count	This report provides a count of both TR and PM work orders that have been Completed, Closed, Cancelled and Auto-Cancelled with the Estimated Time and Time Taken of the Work Orders grouped by Employee. • Completed = total number of work orders where an employee is associated with the last work completed work order history. • Assigned = total number of work orders that an employee was assigned to at the time the report was run. • Worked On = total number of work orders where an employee has any work order history that time taken was recorded. • Cancelled = total number of cancelled work orders that an employee recorded a work started history or was assigned to at the time of cancellation. • Auto-Cancelled = total number of work orders that were auto-cancelled. • Cancelled By = total number of cancelled work orders that the employee cancelled. • Unassigned = total number of work orders that are not assigned.
PM History Summary	This report lists completed work orders by schedule ID that were due within the date range. Checking the Include Cancelled box will also list cancelled work orders that were due within the date range. A drill-down is provided on the schedule ID to view all details of the schedule.
Time Evaluation by Task	This report provides a summary of estimated times and actual times taken to complete tasks. The history count shows how many times the task was completed within the date range.

Planning

Name	Details
Combined TR & PM Resource Forecast	This report shows projected scheduled and on-demand work hours for TR and PM for the next 4 weeks. If this report is being run on a Monday, the forecasted weeks begin on this Monday. If this report is being run any other day of the week, the run date can be either the past or next Monday.

PM Forecasted Manhours	This report provides a summary of estimated monthly task numbers and completion times for up to 12 months from today. The backlog shows all work orders that are due before today that have not been completed or cancelled.
PM Setup	This report shows associations between equipment, schedules, and tasks, including task line details.

Certificates of Insurance

Tenant

Name	Details
COI List	This report displays a list of the Tenant COIs currently on file. The first section summarizes, by property, the total number of COIs, and the number of COIs that are Non-Compliant, Expired, About to Expire within 30 days, Waived, and the number of Tenants missing COIs. Clicking on the totals will provide more details. The second section displays detailed information on the COIs entered, including any messages associated with the COI. Clicking on the subject line of the message will display the message in full.

Vendor

Name	Details
COI List	This report displays a list of the Vendor COIs currently on file. The first section summarizes, by property, the total number of COIs, and the number of COIs that are Non-Compliant, Expired, About to Expire within 30 days, Waived, and the number of Vendors missing COIs. Clicking on the totals will provide more details. The second section displays detailed information on the COIs entered, including any messages associated with the COI. Clicking on the subject line of the message will display the message in full.

Visitor Security

Lists

Name	Details
Visitor List	This report shows expected visitors where the date expected is within the date range for each property. The visits are grouped by the Host Tenant and date expected and show each of the visitor's check in and out times. The report also shows a Pre-Authorized Visit column that states if each visitor was entered through the Tenant Website or not. Cancelled visits are not included. The end of the report shows each tenant's total of expected visitors, visitors checked in and out, and Pre-Authorized visitors, as well as percentages for visitors checked in, checked out, and Pre-Authorized.
Visitor List Summary	This report shows a summary of expected visitors where the date expected is within the date range for each property. The visits are grouped by the Host Tenant and date expected. The report has a Pre-Authorized Visit column that shows totals and percentage of visitors who were entered through the Tenant Website as well as totals and percentages of visitors who have checked in and checked out. Cancelled visits are not included. The end of the report shows each tenant's total of expected visitors, visitors checked in and out, and Pre-Authorized visitors, as well as percentages for visitors checked in, checked out, and Pre-Authorized.

Surveys

Planning

Name	Details
Survey Summary	This report will show a summary of the responses for each question of the selected Survey where the Survey was generated within the date range specified.
Survey Trends	This report will show a summary of the responses for each question of the selected Survey grouped by month where the Survey Instance was generated within the date range specified.