Maintenance

User Guide

Version 1.0

Document version 1.0.2

Contents

Introduction to Maintenance

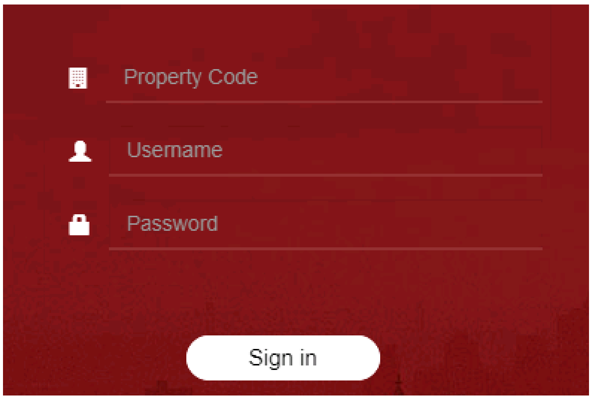
Maintenance is a multi-lingual application that automates, schedules, and monitors all preventive maintenance activities. The application organizes all engineering responsibilities thereby ensuring minimized accidents due to asset malfunction and maximized asset lifetime and health.

Log in to Maintenance

If you are an existing user of our other modules, you can use your existing credentials to log in to Maintenance. We recommend you check with your IT department in case you do not have an existing account. You may also contact us directly on support@knowcross.com.

To log in to Maintenance on the desktop:

1. In your browser, enter the URL in the address bar: https://login.knowcross.com/#/
   (For a quicker and direct access, save this link on your desktop).
2. On the login screen, enter the credentials as shown below:
3. Enter the **Property Code** (as shared by your Unifocus consultant).
4. Enter your **Username**.
5. Enter your **Password**.
6. Select **Sign in**.
   The software opens on the home screen.
7. From the main menu, select the shortcut to access Maintenance.



Maintenance Configuration

You can configure Maintenance directly in the software. This feature can be used for both new property setups and for existing properties using a system configuration application. With this feature, admin users can make changes required for their properties.

To view the maintenance configurations, select the **System Configuration** icon on the platform login. System will reroute to another screen where users can hover on the left side menu.

The maintenance configuration screens can be expanded by clicking on the second icon.

> **Note:** Configuration screen will only be accessible to admin users.

This feature is divided into 6 configuration screens-

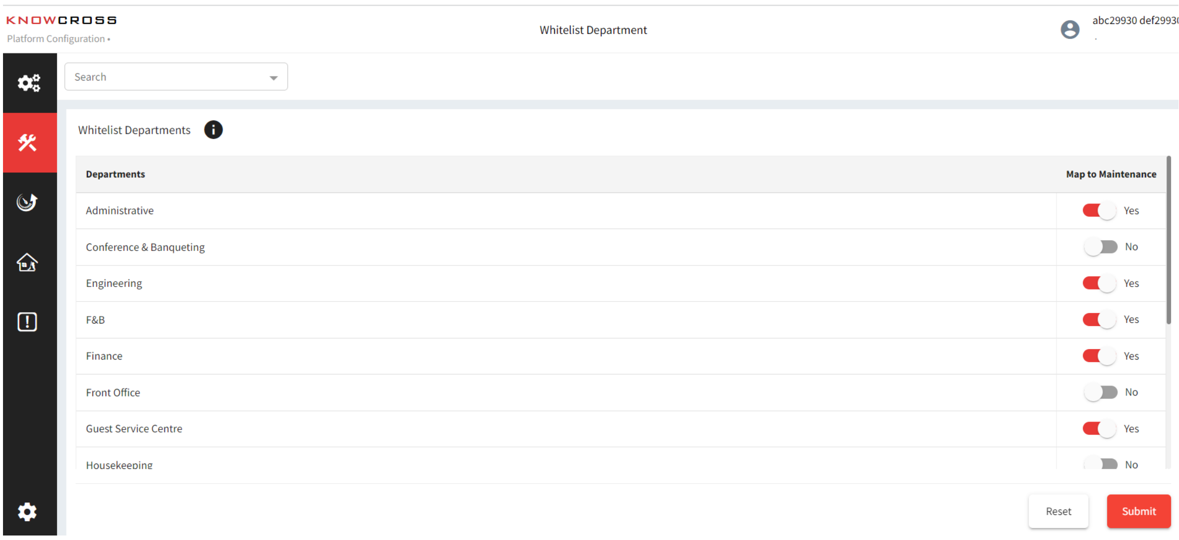
1. Whitelist Departments
2. Default Department and Skills
3. Job Category
4. WO Description
5. Action Reasons
6. WO Type

Whitelist Department

In this configuration screen, you can view all the departments that have been configured for the property. Using the toggle buttons, you can map existing departments as whitelist departments. By selecting the departments and clicking the **Submit** button, the system will add all selected whitelisted departments to the maintenance application.

When setting up a new property, the system will display "No" for all departments by default. Users are required to map departments based on their requirements. If there is an existing property mapped with whitelisted departments, the department will appear as "Yes".

> **Note:** The configuration of whitelisted departments is always performed on the chain level. All properties of the chain will be affected by any changes made.



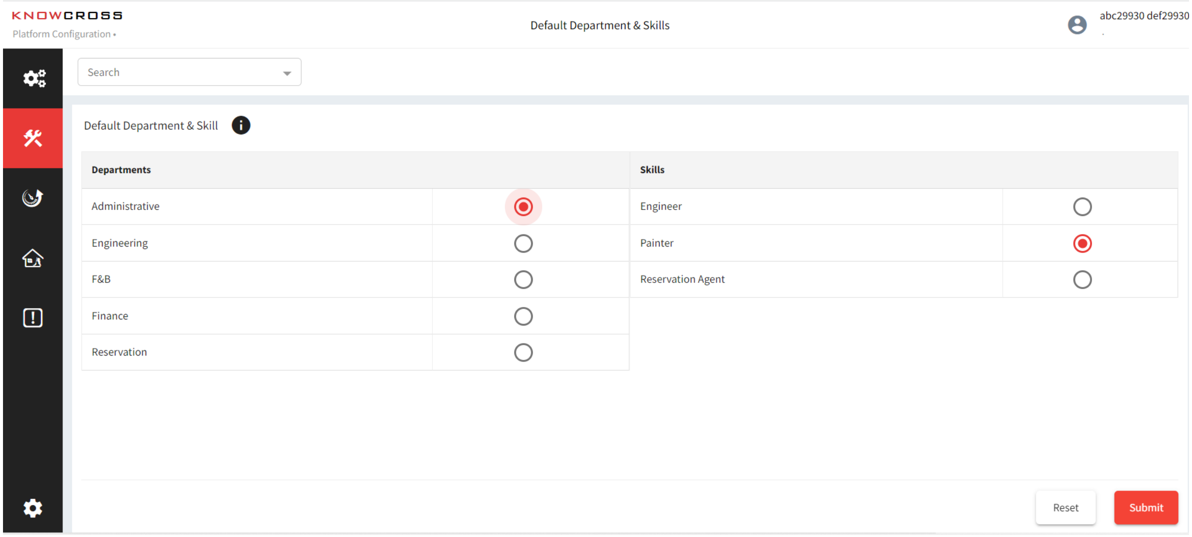
Default Department and Skills

This configuration allows users to view all whitelisted departments and their relevant skills that are mapped to the maintenance application. You need to select one department and relevant skill by selecting the radio button.

You will be able to view the default department and skills while creating New PM.

You will not be able to change the mapping of the whitelist department if any department is set as default.

Note: The configuration of the default department and skills are done on a property level.



Job Category

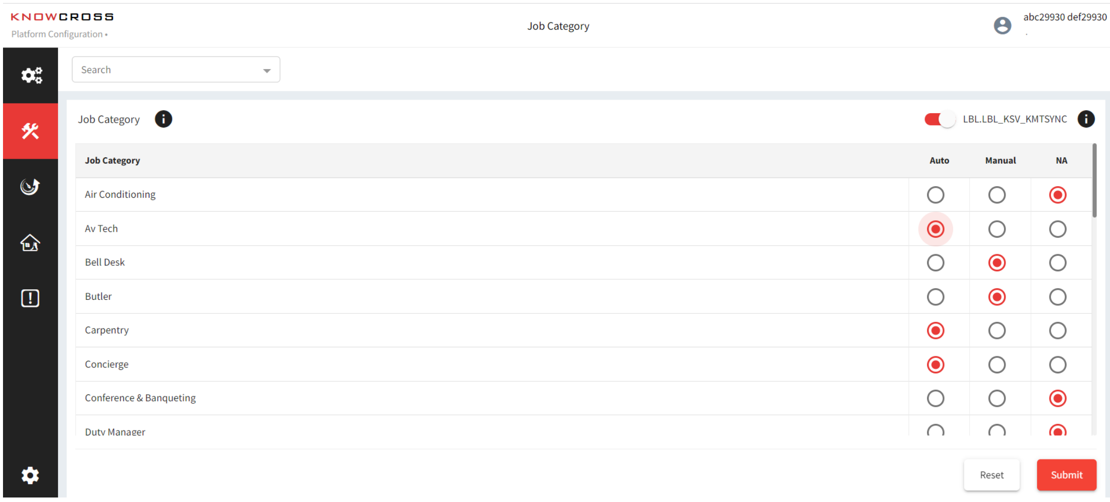
In this configuration screen, you can view all the job categories configured for the property. Use the radio buttons to select job categories.

In the case of auto, the system automatically generates WOs when a job is registered in service with a specific job category. However, the system will create auto WOs if the service maintenance integration flag is enabled.

In the case of manual, the system displays a trigger in the Service module to generate a WO for maintenance. However, if the service maintenance flag is disabled, the system will not generate auto WOs and will also not show a trigger to generate manual WOs.

In case of a new property, the flag for service maintenance will be disabled, and all the job categories will appear as “NA.” In the case of existing properties, the job category mapping will appear as Auto, Manual, or NA (depending on the existing configuration).

Note: The configuration of Job Categories is done on a property level.



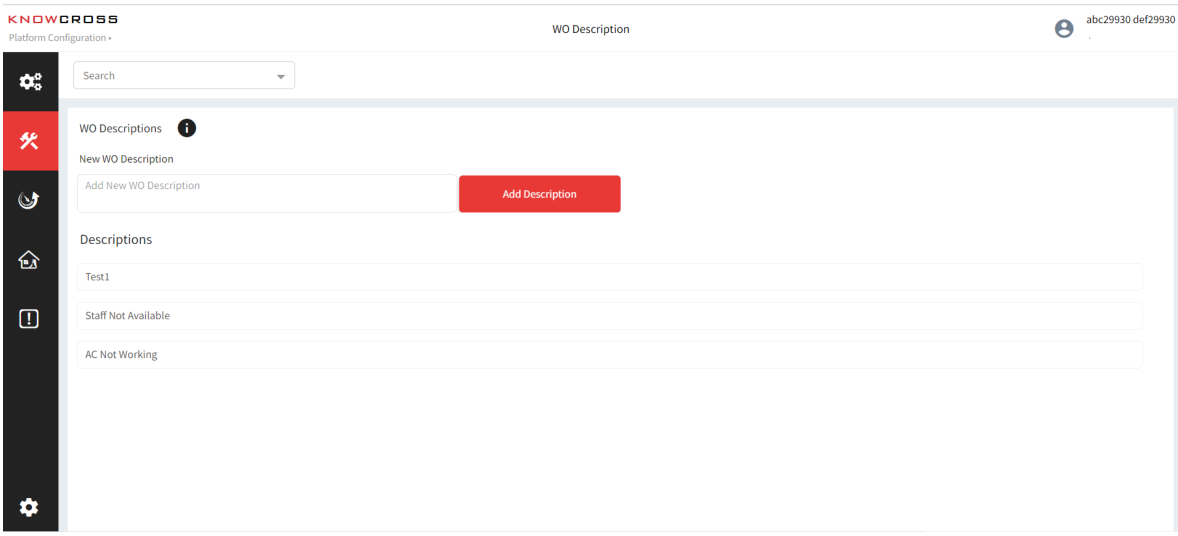
WO Description

In this configuration screen, you can add new WO descriptions, which will be specific to the Maintenance application. You can add the text under the **New WO Description** tab and select **Add Description**.

The system will add the descriptions under the WO Description tab while creating a new WO.

You can also edit or delete the WO description. If you edit the text, the changes will also reflect for existing WOs. Upon deleting the existing WO description, the system removes that description, but the changes will not be reflected on the active WOs.

> **Note:** The configuration for WO descriptions is on a property level.



Action Reasons

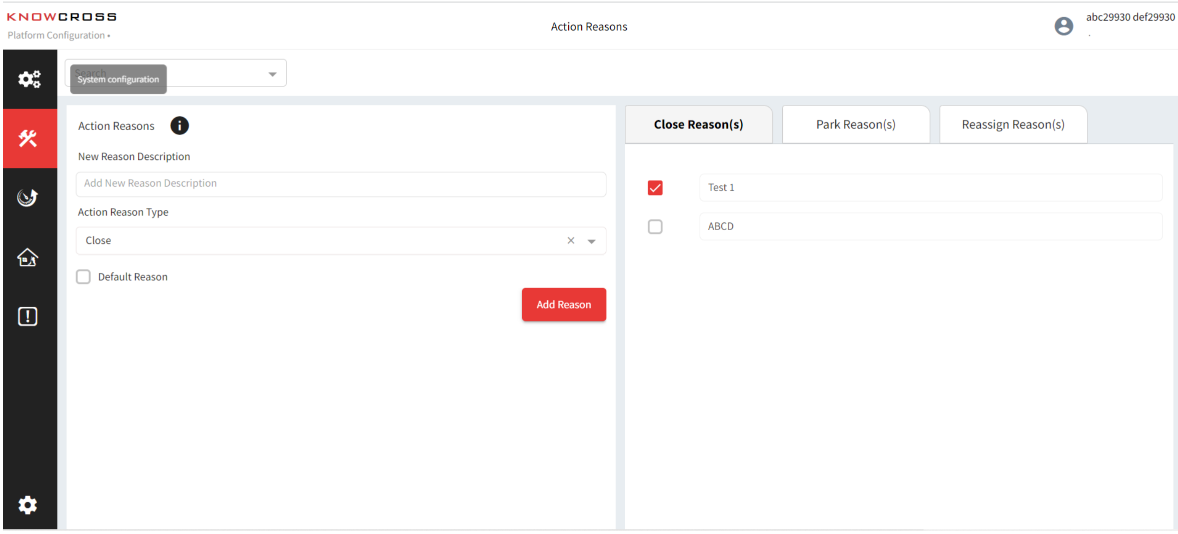
Using this configuration screen, you can add action reasons for closed WOs, parked WOs, and reassigned WOs. You can add new reason descriptions that are confined to the Maintenance application only. Enter the text under the **New Reason Description** tab, select the **Action Reason Type**, and select **Add Reason**.

The system adds the reason as per the selected reason type.

Action reasons can also be edited or deleted by users. If text is edited, the changes will be reflected in existing work orders. When a user deletes the existing action reasons, the system will remove it, but the changes will not be reflected on existing WO.

Note: If users add any action reason as default, the system displays it as pre-added text while performing on the WO.

Note: The configuration for Action Reasons is on a property level.



WO Type

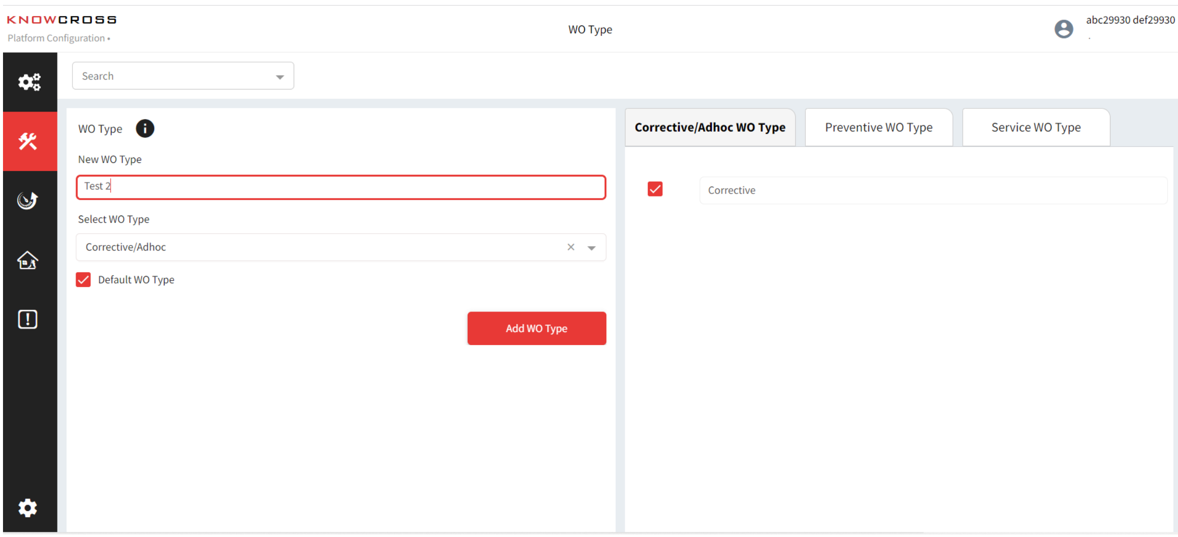
Using this configuration screen, users will be able to add WO Type for Corrective/ Ad Hoc WOs, Preventive WOs, and Service WOs. The user needs to add the text under the "New WO Type" tab select "WO Type" and click "Add WO Type".

The system will add the WO Type as per the selected type i.e., corrective, preventive, and service.

WO Type can also be edited or deleted by users. If text is edited, the changes will also be reflected in existing work orders. When a user deletes an WO type, the system will remove it, but the changes will not be reflected on existing WO.

Note: If users add any action reason as default, the system will show it as pre-added text while performing on the WO.

Note: The configuration for WO Type is on a property level.



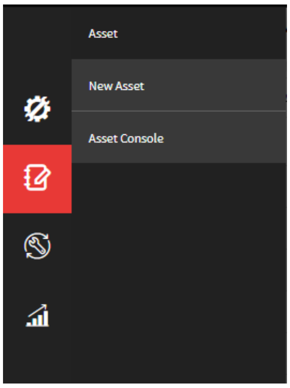
Maintenance Asset management

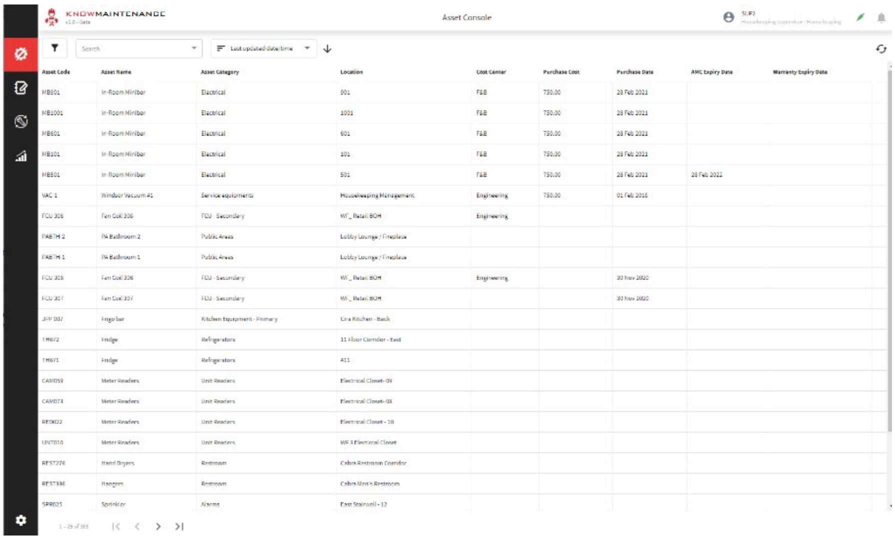
Maintenance assists you with managing all your assets. Using the depository, you can view your assets and track information, such as purchase and installation dates, warranty status, expiration dates, and Preventative Maintenance Schedules.

Asset console

To access the Asset console, select the first icon in the main menu and select **Asset console**.

When the Asset console opens, you will see a screen like the one shown below. This screen displays all configured assets.



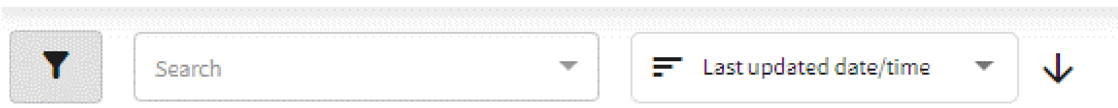


The following columns are visible by default:

Asset Code	Unique identifier code associated with the asset.
Asset Name	Name of the asset.
Asset Category	Category to which the asset belongs.
Location	Physical location of the asset within the property.
Cost Centre	Associated cost center.
Purchase Cost	Cost of the asset when it was purchased.
Purchase Date	Date when the asset was purchased.
AMC Expiry Date	Date when the Annual Maintenance Contract for the asset expires.
Warranty Expiry Date	Date when the asset warranty expires.

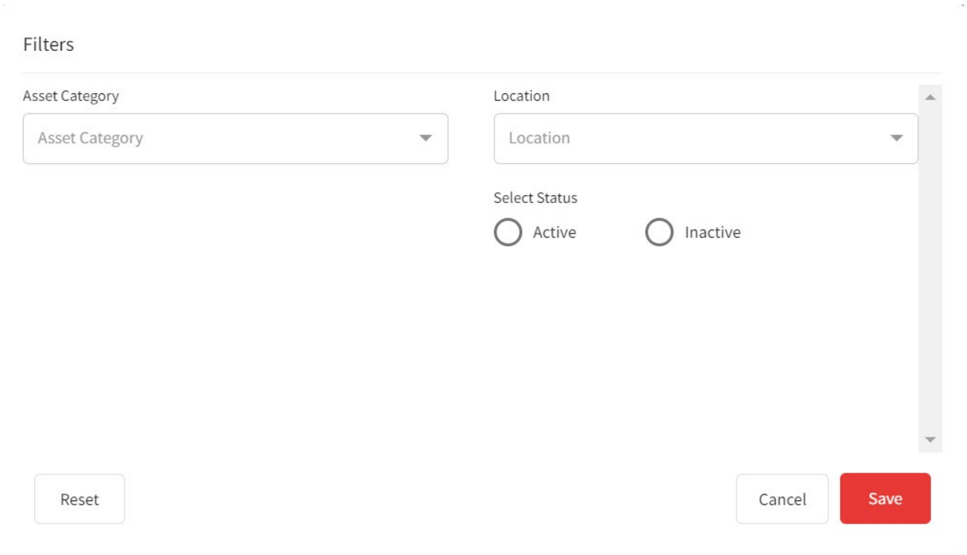
Navigating the Asset console

You can search, sort, and filter the Asset Console to better navigate the information on the screen.



Filtering the Asset console

Use the filter to view assets based on location or category. You can select multiple filters to combine multiple locations with multiple categories.

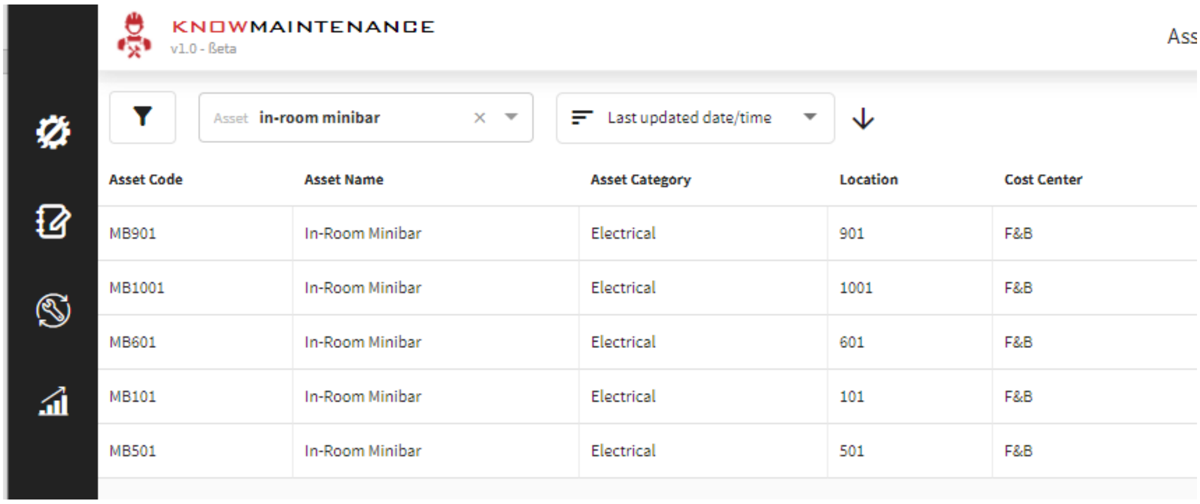


Searching the Asset console

You can search for a specified asset or location.

1. Enter the name of the asset or the location you are searching for.
2. Select either **Asset** or **Location**.
3. Select **Enter** to confirm.
   The console updates accordingly.

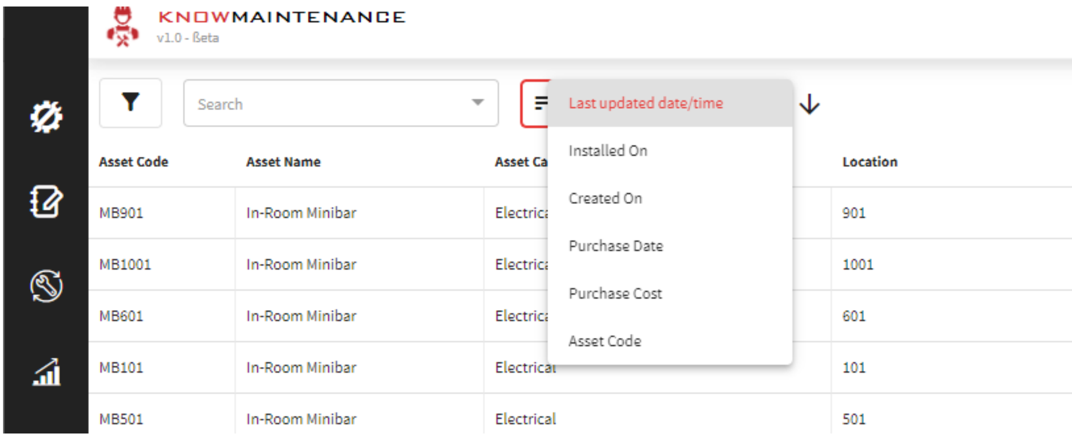
> **Note:** Select X to clear the Search bar.



Sorting the Asset console

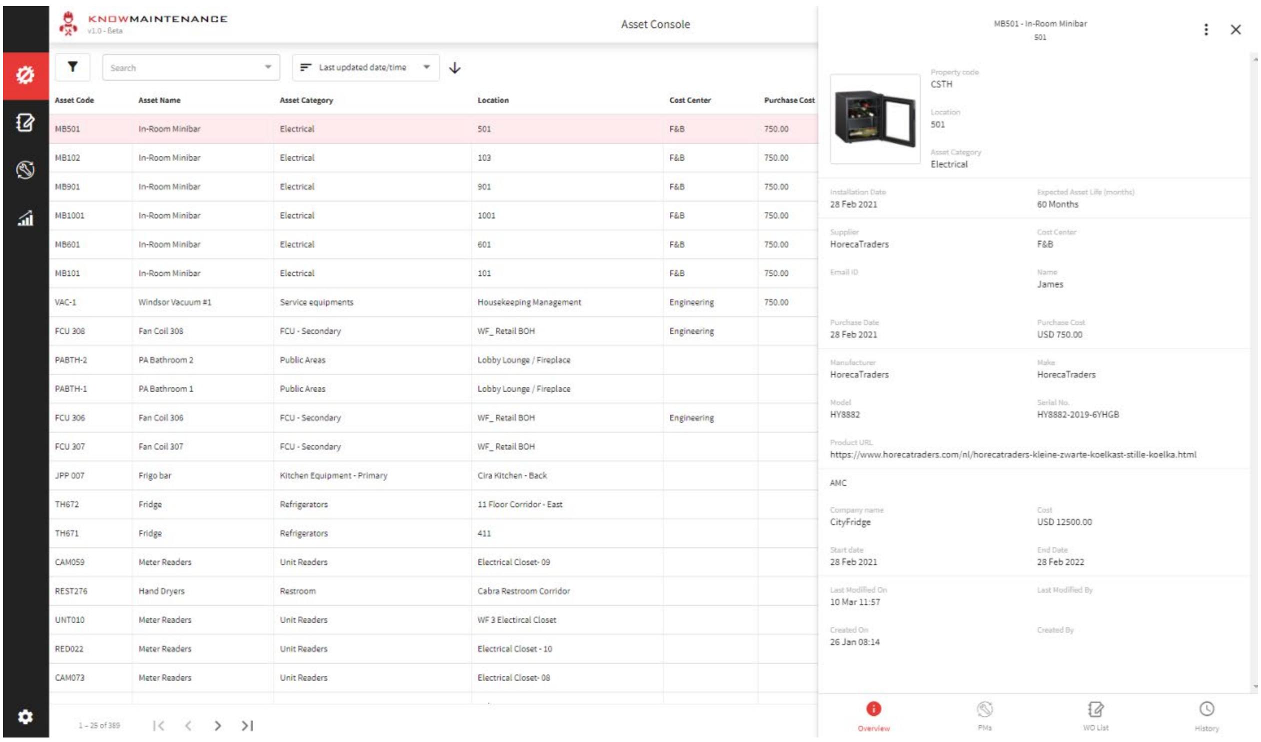
Use the Sort by drop-down list to change the order in which information appears on the screen. You can use the arrow to reverse the list in ascending or descending order. Options include:

Last updated date/time	Assets with the most recent changes appear at the top of the list.
Installed On	Assets with the most recent installation appear at the top of the list.
Created On	Assets with the most recent creation date appear at the top of the list.
Purchase Date	Assets with the most recent purchase date appear at the top of the list.
Purchase Cost	Assets with the highest purchase cost at the top of the list.
Asset Code	Assets are sorted alphabetically (A-Z) by Asset Code.

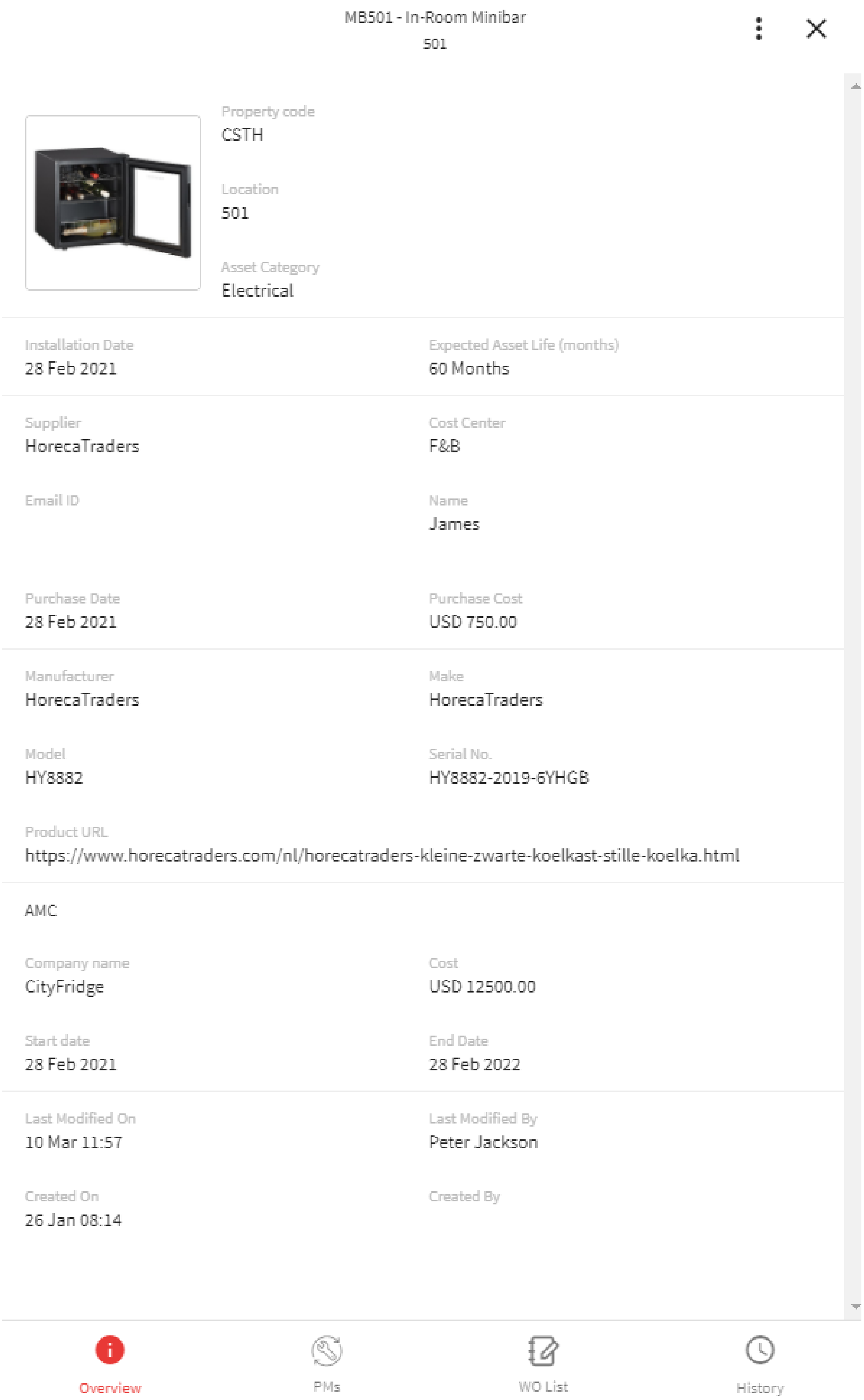


Asset details

To see all details of an asset, select the asset that you want to view. An information pane opens on the right side of the screen.



From the asset details page, you can view information about the asset, such as the name of the supplier, warranty information, details regarding the history of the asset, and associated Preventative Maintenance Schedules.



The asset details page includes the following information:

Property Code	Identifier for the property where the asset is located.
Location	Location for the asset.
Asset Category	Category to which the asset belongs.
Installation Date	Date when the asset was installed.
Expected Asset Life	In months.
Supplier	Supplier for the asset.
Cost Center	Cost center for the asset
Email Id	Email address for the supplier.
Name	Name of the contact person for the supplier.
Purchase Date	Date when the asset was purchased.
Purchase Cost	Cost at which the asset was purchased.
Manufacturer	Name of the manufacturer.
Make	Make Number
Model	Model Number
Serial No.	Serial number.
Product URL	Web address for the product
AMC	Annual Maintenance Contract.
Company Name	AMC Provider.
Cost	AMC Cost.
Start Date	AMC Start date.
End Date	AMC End date.
Last Modified On	Date when asset was last updated.
Last Modified By	Name of the person who last made changes to the asset.
Created On	Date when the asset was created.
Created By	Name of the person who created the asset. If blank, the asset was created by importing data.

The PMs tab displays all PMs that include this asset.

MB501 - In-Room Minibar
501

Name	Start date	Frequency	Variance
Monthly Generator Check	01 Mar 01:00	On Every 1 Month(s)	

The WO List tab displays all WOs generated for the selected asset.

MB501 - In-Room Minibar
501

WO #		Description	Technician	Started On	Completed On	Type
#2021-126		Kitchen Freezer not working				Breakdown
#2021-85		Minibar - Cabinet To Fix	SUP2	08 Mar 16:49	08 Mar 16:49	Corrective

The History tab displays all changes made to the asset.

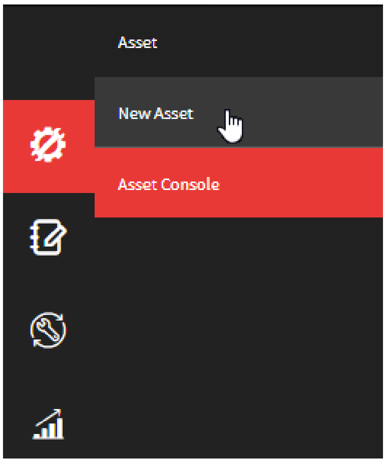
MB501 - In-Room Minibar
501

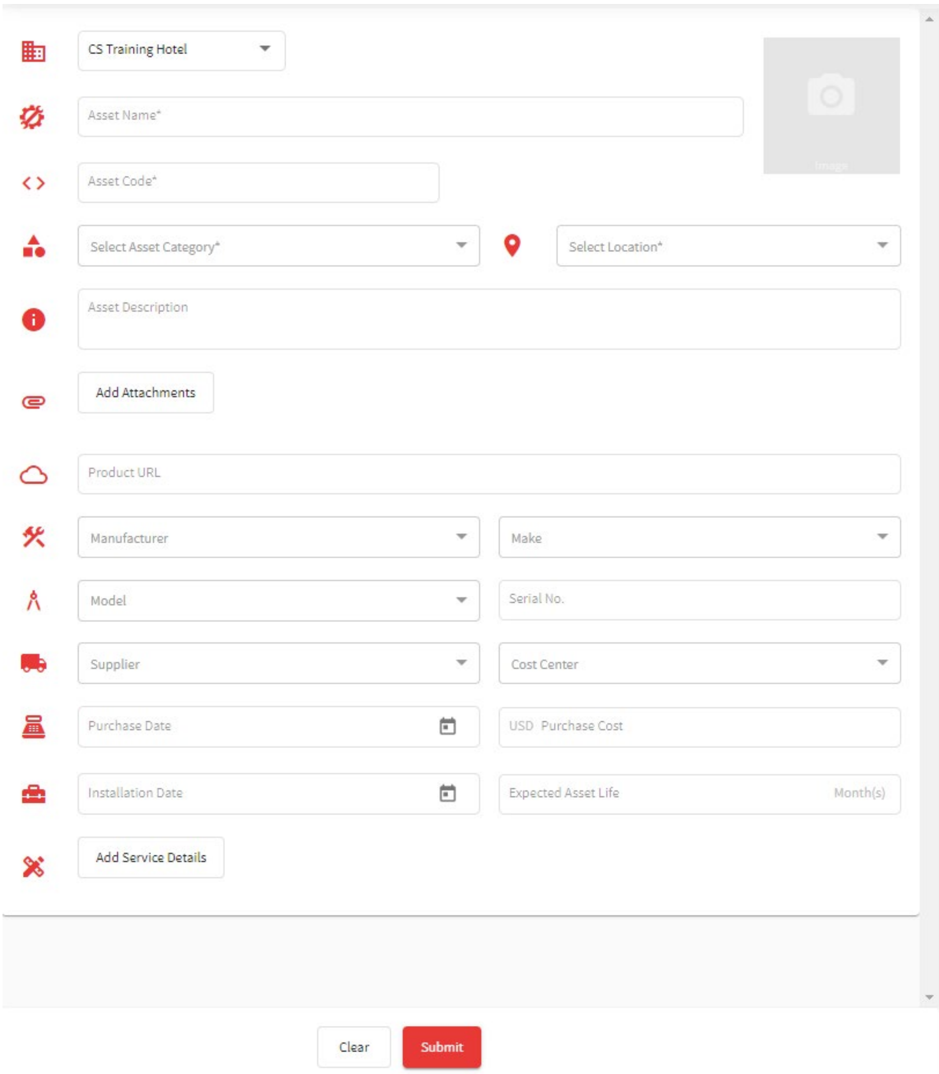
Time	Action	By	Details
11 Mar 10:24	Asset Updated	Peter Jackson	Asset Updated
11 Mar 10:20	Asset Updated	Peter Jackson	Asset Updated
11 Mar 10:18	Asset Updated	Peter Jackson	Asset Updated

Creating New Assets

Use the New Asset screen to create new assets. The New Asset screen contains four required fields. All other fields are optional. Required fields are marked with an asterisk (*) and include the following:

Asset Name	Name for the asset.
Asset Code	A unique identifier for the asset.
Asset Category	Select the category that the asset belongs to.
Asset Location	Select the location where the asset is located.





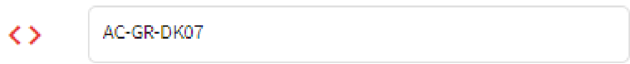
Required field – Asset Name

The first field is **Asset Name**. Use this field to give a name to the new asset.

The asset name does not need to be unique but should describe the asset is. Do not include the location in the asset name, as you can move assets to other locations.

Required field – Asset Code

The next field is the **Asset Code**. This code must be unique to the asset and cannot be duplicated. Maintenance does not generate asset codes. When creating asset codes, keep in mind that assets can be moved to other locations. If you duplicate an asset code, an error message appears when you try to save the new asset.



Required field – Asset Category

Next, select the **Asset Category** to which the newly created asset belongs. Use the drop-down menu to select from the existing options.

Required field – Asset Location

Lastly, select the **Location** where the asset is physically located. This can be a room number or property name.

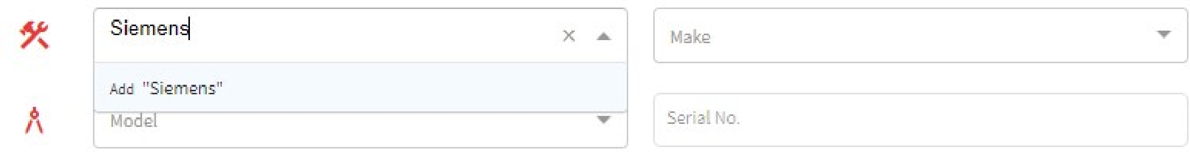
Optional field – Asset Picture, Description, and Attachments

Select the **Image** field to attach a picture of the asset. Use the **Description** field to provide more information. You can also use **Attachments** to include documentation, such as instruction manuals.

Optional field – Asset Technical and Financial information

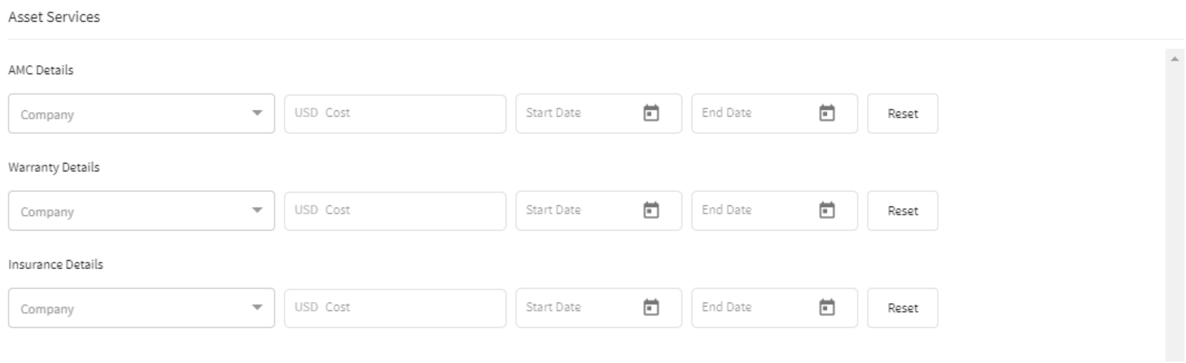
You can associate technical and financial data with the asset. This data can then be included in relevant reports.

Manufacturer	Manufacturer of the asset.
Make	Asset Make.
Model	Asset Model.
Serial No	Serial number for the asset.
Supplier	Name of the supplier.
Cost Center	Financial cost center
Purchase Date	Date when the asset was purchased.
Purchase Cost	Cost at which the asset was purchased.
Installation Date	Date when the asset was installed.
Expected Asset Life	Expected asset life in months.



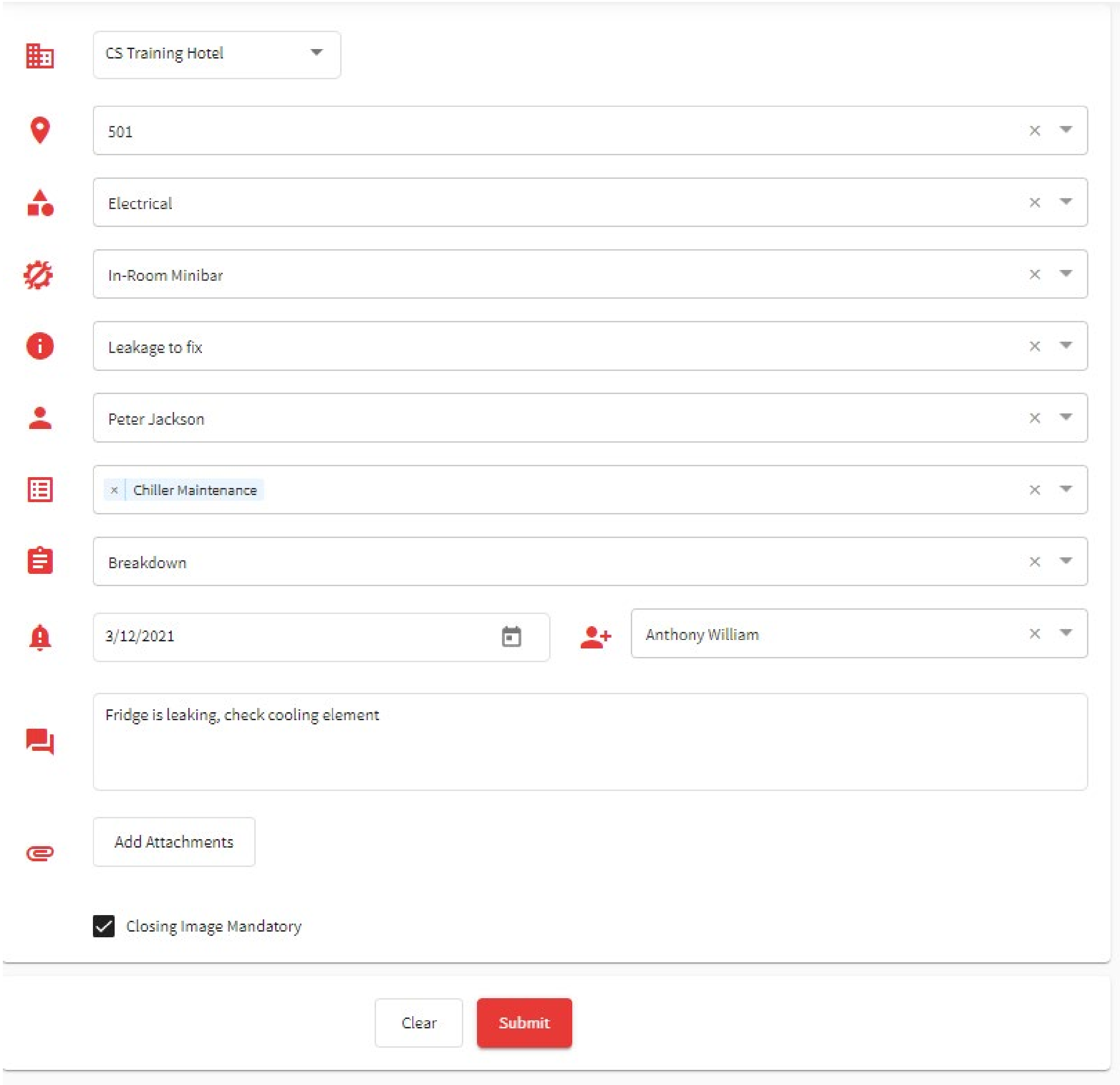
When completing optional fields, such as Manufacturer, the platform allows you to either select from existing entries or to create a new entry using the **Add** button.

When you select **Add Service Details**, you can update your Annual Maintenance Contact details, insurance details, and warranty details.



Maintenance work orders

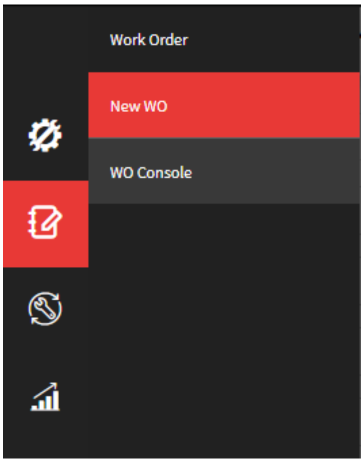
Work orders, or WOs, can be created for any asset. Work orders can be created manually, triggered by Preventative Maintenance Schedules, or created by integration with Service. Works orders can be viewed and updated using the Work Order console or with the Maintenance mobile application.



Creating a work order

From the main menu, select the second icon and choose **New WO**.

Using the New Work Order screen, you can submit a new work order for any asset. To register a new work order, you need to update the following mandatory fields:

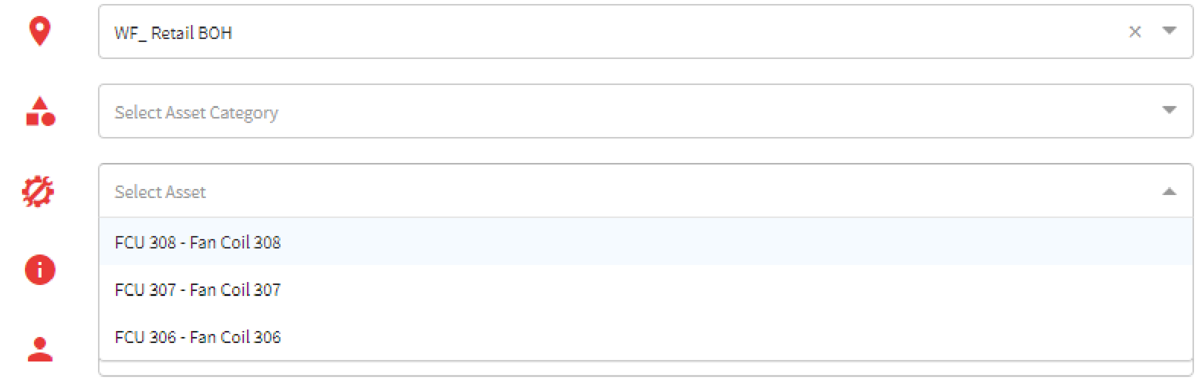


Location	Location of the work order.
Description	Description of the work that needs to be done.
WO Type	Type of work order.

All other fields are optional.

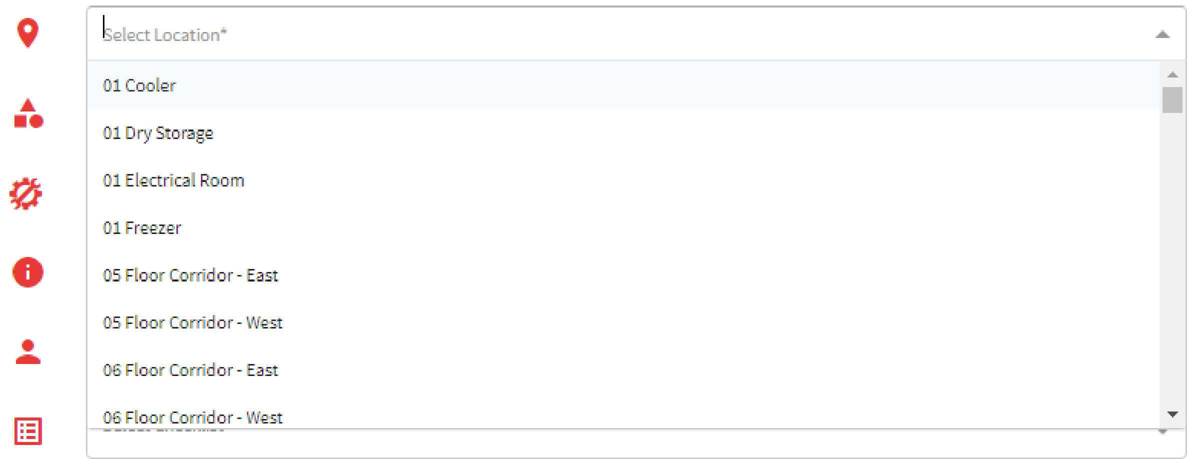
Required field – Select Location

Using the **Select Location** drop-down list, select the location where work needs to be completed.



Optional field – Select Asset

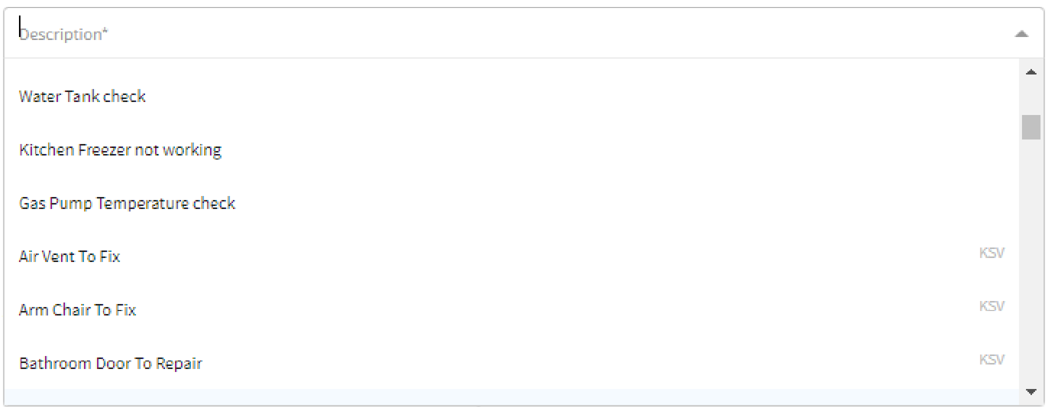
If you want to associate an asset with a work order, select a location from the **Select Asset** drop-down list. All registered assets for the selected location appear.



When you have selected the required asset, the **Select Asset Category** field also updates. If there are many assets to sort through, you can use the Asset Category as a filter.

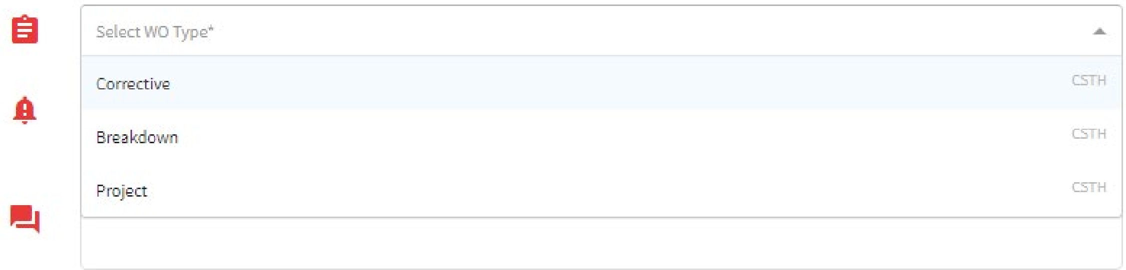
Required field – Description

When navigating the **Description** list, some Descriptions might appear with KSV in the same line. These descriptions are imported from Service to be used in Maintenance. Other descriptions are unique to Maintenance. You can select either a Service or Maintenance description for your work order.



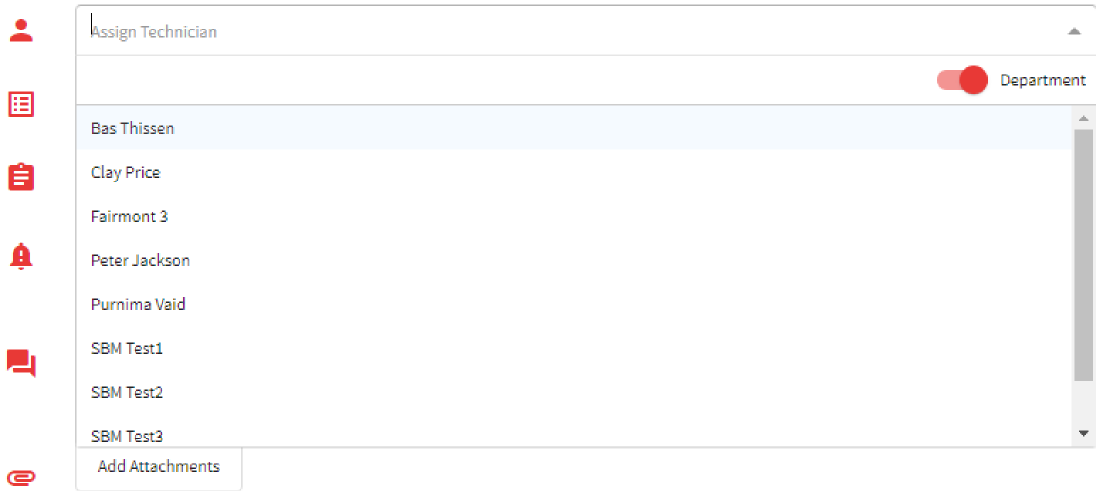
Required field – Select WO Type

Next, use the **Select WO Type** drop-down list to define what type of work needs to be done. Selecting a work order type allows for more detailed reporting.



Optional field – Assign Technician

When you create a work order, you can assign a technician for immediate action, or you can leave this blank for later assignment. By default, the screen shows technicians from the Engineering Department. Use the **Department** toggle to assign the work order to another department.



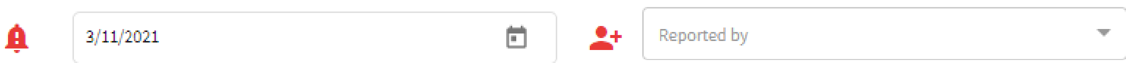
Optional field – Attach Checklist

When you create a work order, you can attach a checklist, or you can leave this blank for later assignment. The screen shows checklists created within the system from the Engineering Department.

Optional field – Due Date and Reported By

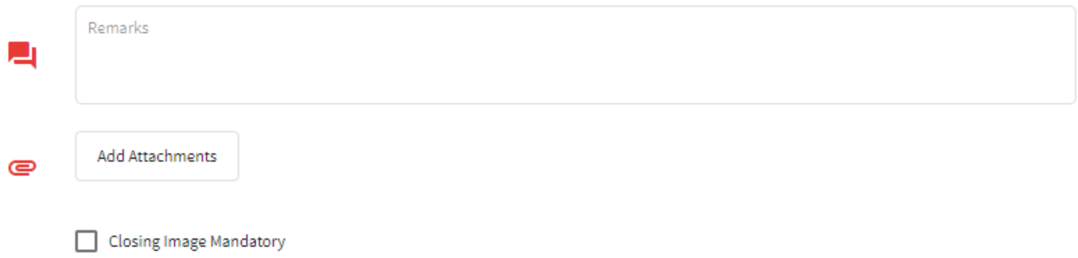
Change the **Due Date** of the work order if the work order does not need to be completed on the same calendar date as it is created. Select the calendar icon to change the date.

If you want to update the name of the employee that reported the work order, use the **Reported by** field to update this information.



Optional field – Remarks, Attachments, and Closing Images

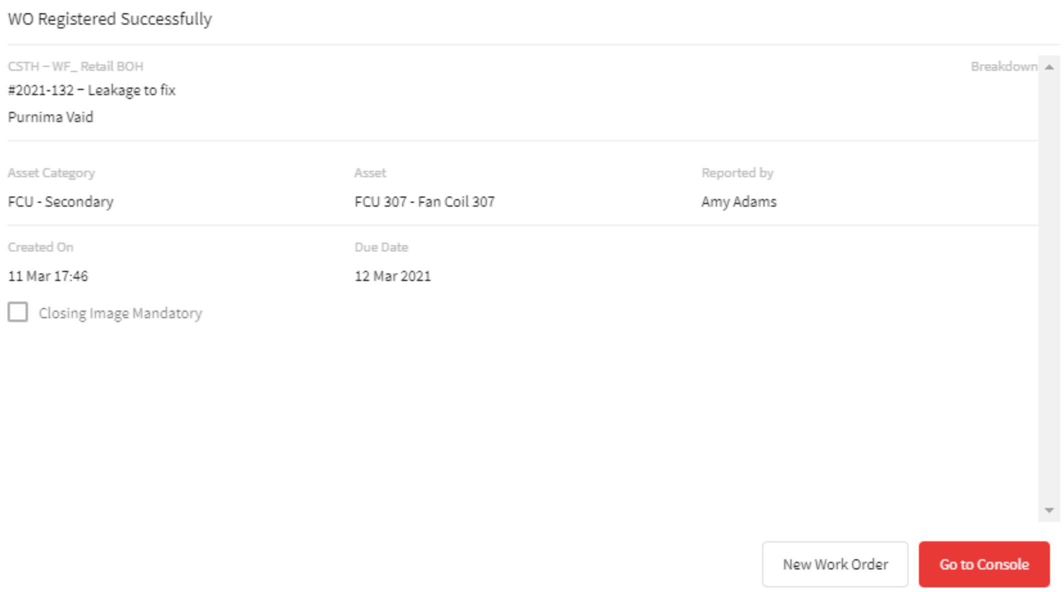
When there is more information to share with the technician, use the **Remarks** field to enter custom notes, or use the **Add Attachments** option to upload a Word, Excel or PDF document for further reference. If you require the technician to attach a picture when closing the work order, select the **Closing Image Mandatory** checkbox.



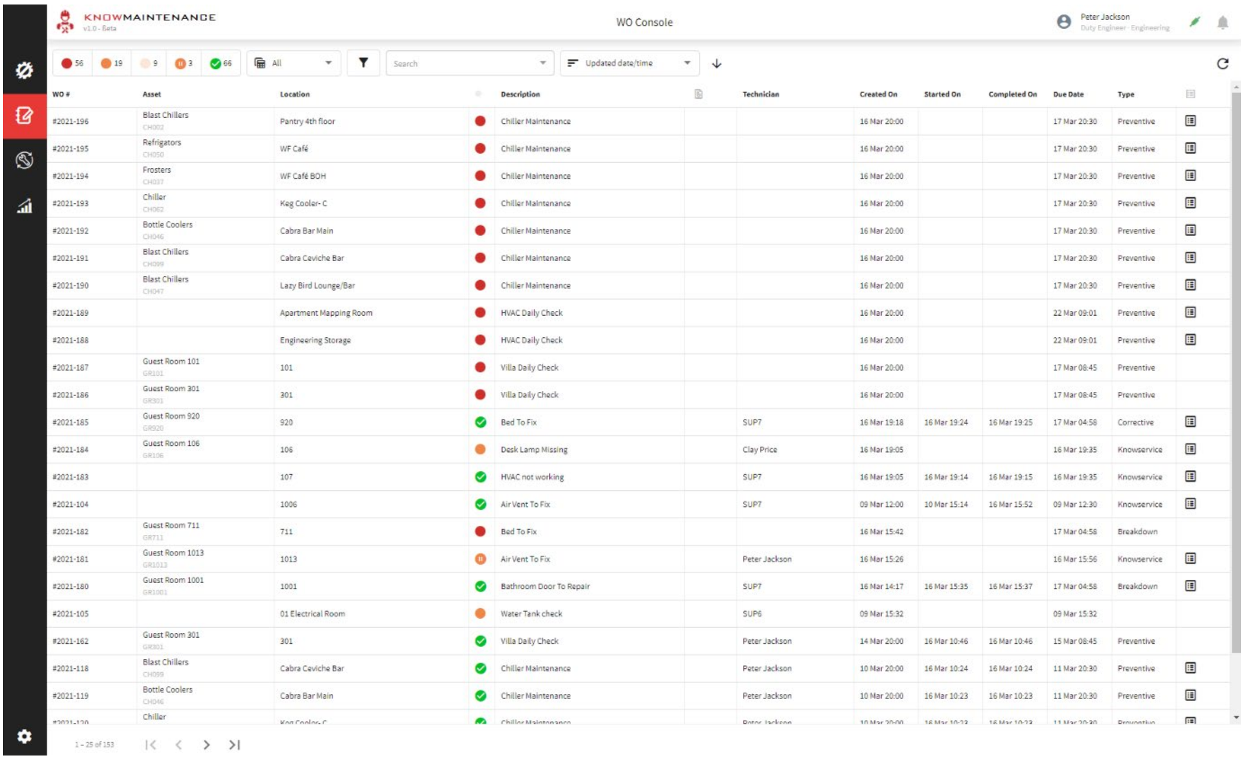
Submitting a work order

When you have updated all required information, select **Submit**.

The confirmation screen displays a work order number that can be used for reference. In this example, the work order number is #2021-132.



Work Order Console



All work orders created can be viewed or updated from the WO Console. This screen displays all work orders created either through Preventative Maintenance Schedules, through Service integration, or using the Maintenance platform. All work orders appear on this screen until they are completed. Completed work orders are archived for 30 days after completion.

Sorting and filtering the Asset console

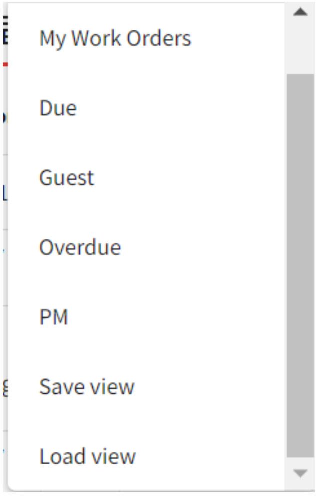
All work orders can be viewed on the Asset console. You can sort and filter the screen to navigate the console with ease. Each work order is marked with a status icon:

- **Unassigned** – Work order is registered but not assigned to a technician.
- **Assigned** – Work order is registered and assigned to a technician.
- **Pending** – Work order is pending approval.
- **In Progress** (Blinking) – The technician selected Start and has begun work on the work order.
- **Parked** – Work order is Parked, or on hold.
- **Complete** – Work order has been completed by the technician.

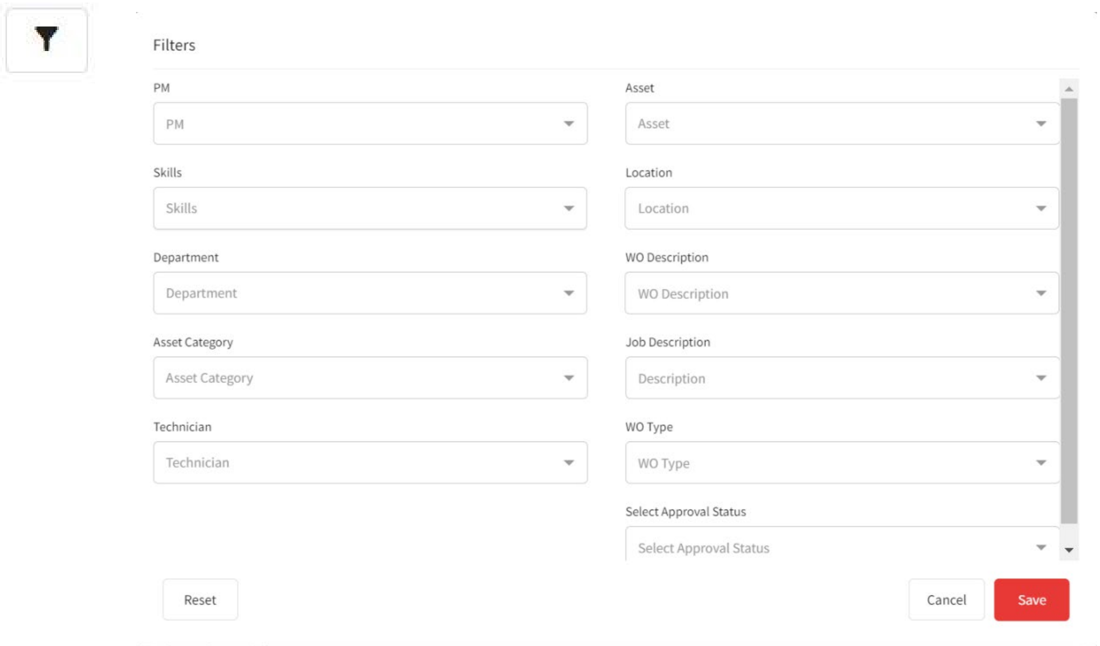
In the top left of the console, a tracker displays the total number of work orders in each status. Select a status to view all work orders in that status. The selected status is highlighted in grey. Selecting the status again reverts the console to default setting and displays work orders of all statuses.

You can also filter the screen to display:

- All work orders assigned to you.
- All work orders that originated from occupied guest rooms.
- All work orders due to be completed today.
- All work orders that are overdue or late.
- All work orders that were triggered by a Preventative Maintenance Schedule.
- User can add save view with filters.
- After saving the view with filters, users can click on Load View

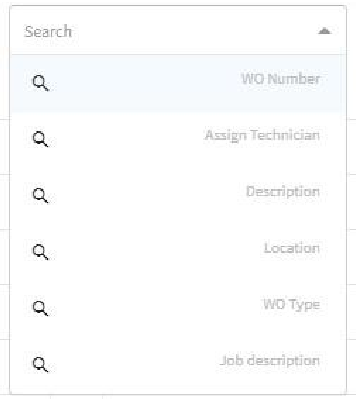


The Filter button allows you to apply one or more filters on the screen. Select the **Filter** button to open a dialog box where you can select which filters you want to apply. Use the drop-down lists to select the relevant filters and select **Save** to apply.



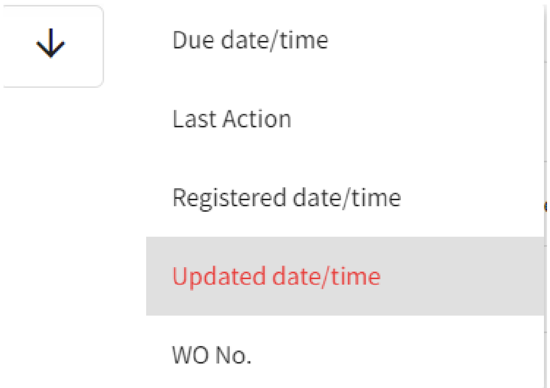
There is also a **Search** option. You can search the following fields on the console:

- WO Number.
- Technicians.
- WO Description.
- Location.
- WO Type.
- Job Description.
- Job Number



Lastly, you can organize all entries based upon the following events:

- Date and time when the work order was last updated.
- Last action taken.
- Date and time when the work order was first logged.
- Date and time when the work order is due.
- Work Order Number.



Note: The arrow button allows you sort in either ascending or descending order.

Save View and Load View option on WO console

User will be able to save their filtered view of the WO Console. By clicking on the filter button, user can add filters such as:

- Department
- Asset Category
- Technician
- Asset
- Location
- WO Description
- Job Description
- WO Type
- Approval Status

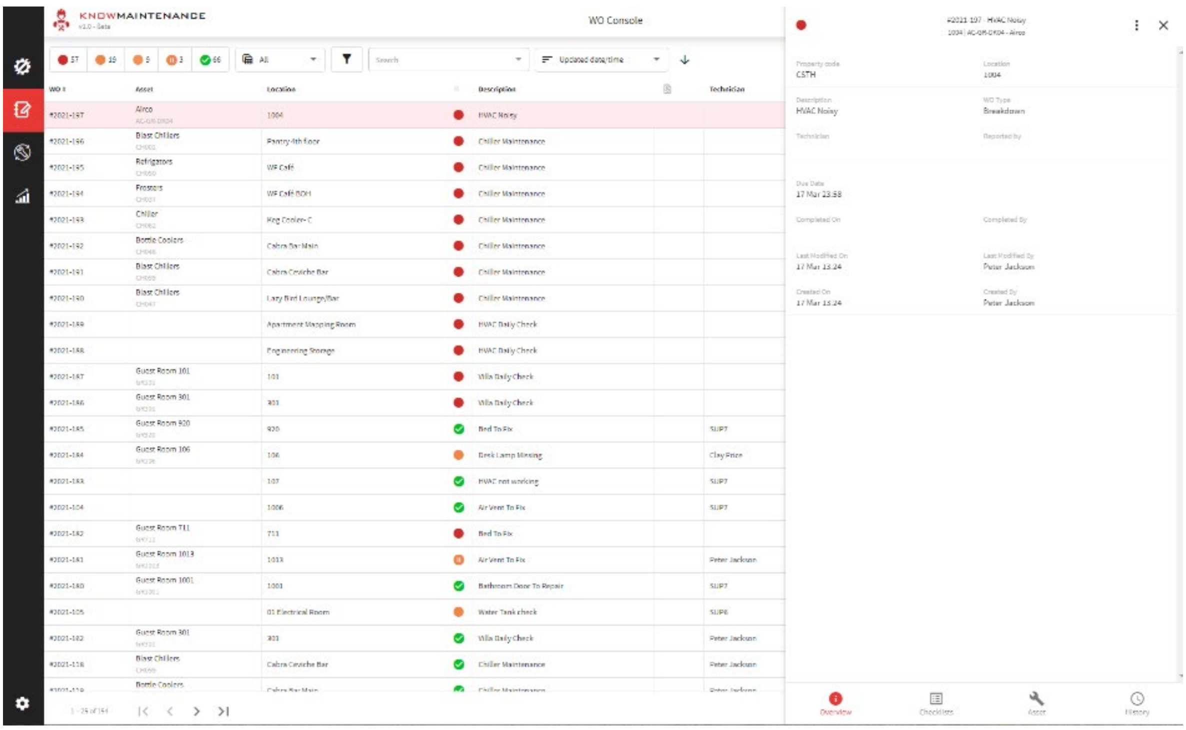
After selecting the search filters on the Filters screen, you can save the search filters by selecting **Save View**. The system saves the selected search filters. You can directly view them by selecting **Load View**.

> **Note:** You can save only one view. If you save another set of search criteria, the system overwrites the previously saved search filters.

Work order details

When you select a work order, the details pane opens on the right side of the console. The details pane consists of four tabs: Overview, Checklist, Asset, and History.

Each tab displays different information about the work order. When you select the ellipsis icon in the top right corner, a menu expands with additional actions that you can take.



The Overview tab

The **Overview** tab displays information about when the work order was created, who created the work order, and to which technician the work order is assigned. Select **Add Notes** to enter more information about the work order. You can add new notes at any time until the work order is closed. Select **Add Attachment** to add .pdf documents to the work order, such as installation or user manuals.

The Checklists tab

In the **Checklist** tab, you can view the checklist associated with the work order. If no checklist is attached, you can add one here.

1. Select the ellipsis icon.
2. Select **Update Checklists**.
3. From the resulting drop-down list, choose one or multiple checklists.

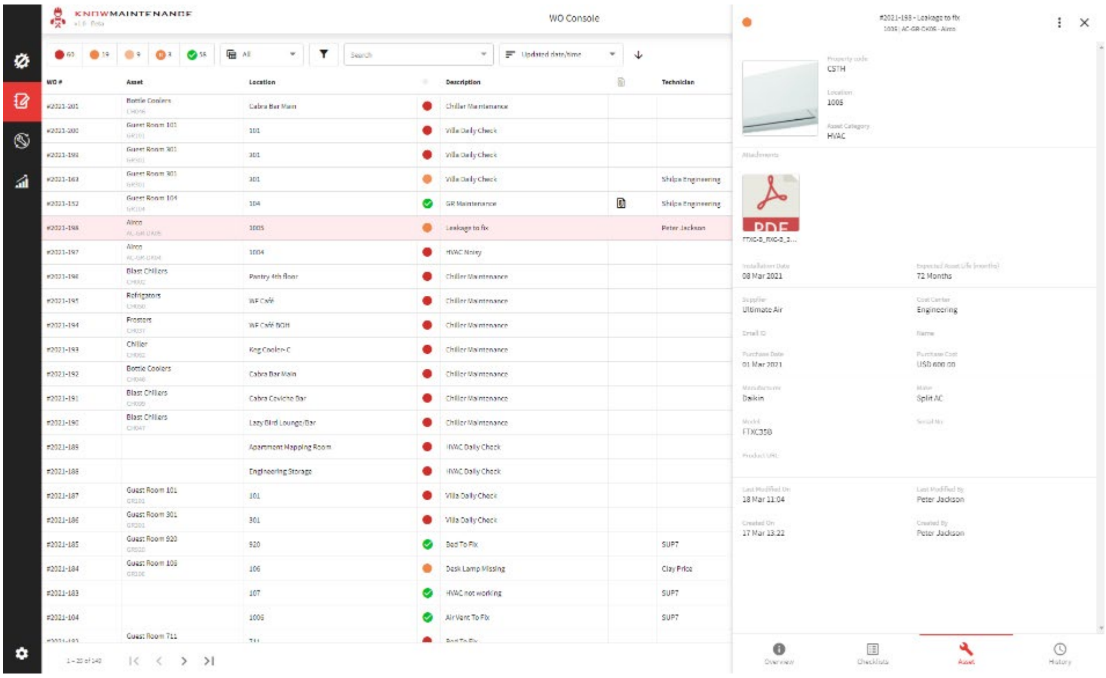
4. Select **Save** to update.

> **Note:** Select the **X** next to a checklist to remove it from the work order.

> **Note:** If a work order is in progress or has been completed, the checklist updates.

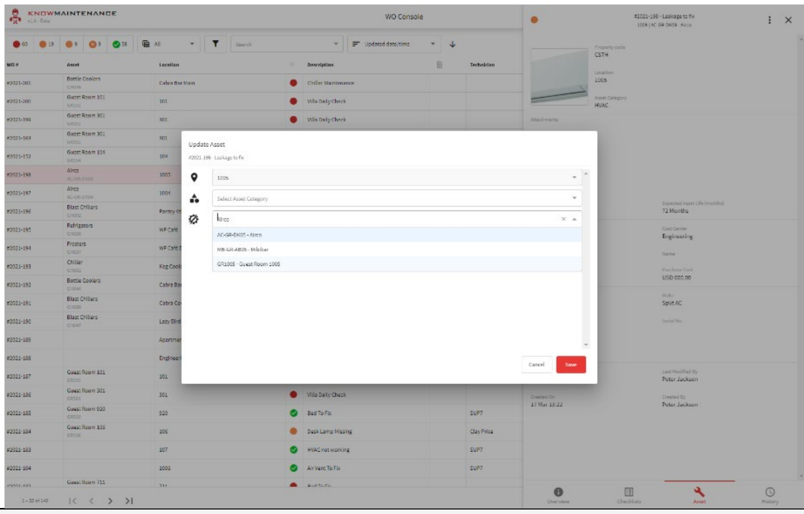
The Assets tab

If there is an asset associated with the work order, you can view details from the **Asset** tab.



If no asset is associated with the work order, or the wrong asset has been linked, select the ellipsis icon and choose **Update Asset**.

The **Update Asset** screen *only* displays assets that are registered for the location in the **Asset** drop-down menu. You can filter the list by category to locate the asset that you want to view or update.



> **Note:** You cannot change the asset for work orders that were generated by Preventative Maintenance Schedules.

> **Note:** You cannot change the asset for work orders that have been Started.

The History tab

The **History** tab displays a chronological account of events from the time of the work order's creation. All actions such as updates, changes, and remarks can be found here for review. All items on this tab are read-only.

The Approval tab

The Approval tab displays an approval detail and the cost details for the Asset attached. Under this tab, users can view the quantity, rate and amount added for the Asset. This tab includes the following information and details.

- WO commercial approval details: Parts name, Quantity, Rate and Amount.
- Contractor to whom the WO has been assigned (If applicable).
- Approval Action: Approver will be able to take action to approve / reject the WO.
- Approval Action history: The history of WO Rejection / Approval will be displayed here.
- Invoice Details: Upon completion of the WO invoice details (if uploaded) of the WO can be seen.

Note: Access to this tab is based on user permissions.

Approval User Group

The existing user Group functionality has been enhanced to create a new user group as Approval User Group.

- A checkbox on the create / edit user group screen allows you to enable the user group as approval user group.
- Approval-enabled user groups are shown as part of drop-down value on the WO Approval submission form.
- All users of the selected user groups will be notified when a WO is submitted for approval.
- Any user who is part of the approval group will be able to take an action on the WOs submitted to that group for approval.

Approval Process

Approval request on a work order can be initiated only from the following WO stages:

- Assigned
- In Progress

The steps / process to submit any WO for approval are:

1. Select a WO to view the details.
2. You will see a Submit for Approval option in the menu option of the WO on web and action tab of the WO in Mobile.
3. Select **Submit For Approval**,
   A dialog box appears.
4. Enter the commercial details. User can enter Parts cost and Labor cost while seeking approval.

Approval Filter

The WO Console now features a new status of *Pending Approval*. If you select this filter, the system shows the WO records that are pending for approval action. There is also a filter for the approved / rejected WO.

Approver action - Approve / Reject a Work Order

The WO on which approval is requested by a user will be available for approver's action.

Notes:

1. This feature is available on both Web and Mobile.
2. For a user to Approve a WO, they should have the following rights:
   - Access to WO.
   - Approval Right.

   Users should be part of the designated approval group.
3. Once Approved / Rejected, the assigned technician is notified about the status.
4. The WO is updated with Assigned status once the approval action has been taken on the work order.
5. Once a WO is submitted for approval, you will not be able to take any other action on the WO until it is approved / rejected.
6. If a WO is approved, the Submit for Approval action is disabled, and you will not be able to resubmit the same WO for approval.
7. If a WO is rejected, the Submit for Approval action is available if you want to resubmit the WO for approval.

Complete work order and update commercial details

The WO Complete functionality allows you to capture the Invoice details against the work order. The system provides the following fields to capture the data.

- Invoice number
- Invoice date
- Invoice amount
- Call out fee
- Labor cost
- Parts cost

Note:

- The WO Complete form has commercial details fields that are visible to the users if they have the right to add invoice details.
- Users with Invoice update access will be able to update values.
- Users who do not have access to the Invoice details will not be able to access the same.

Update Values option to user after adding details

Select the **Update Values** option after selecting a completed WO and can enter the following values:

- Invoice Amount
- Call Out Fee
- Parts Cost
- Labor Rate
- Time Spent

You can enter the Invoice Amount or Parts Cost. You can also update Labor Rate and Time Spent, and system will auto-calculate the Labor Cost for the WO.

The system enables the Save option once updates any value in the WO.

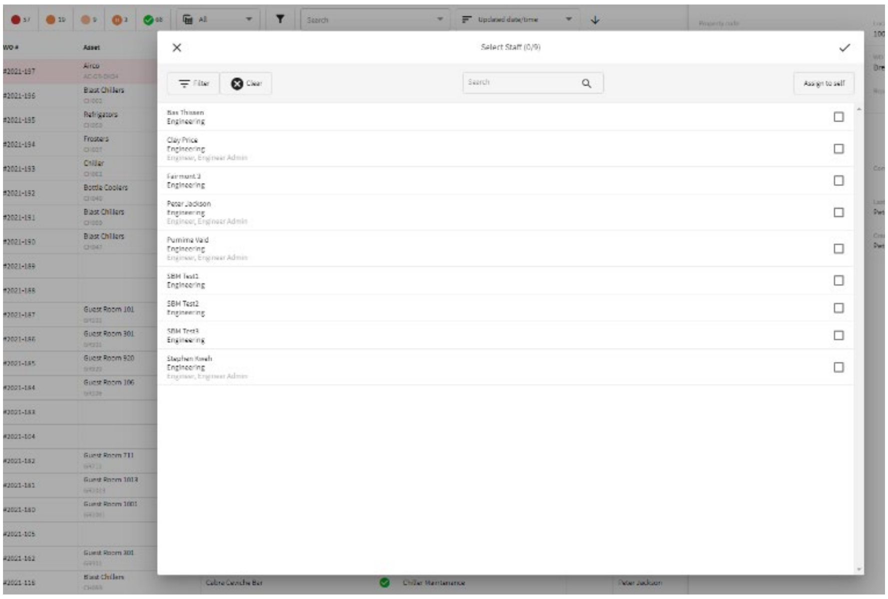
Work order actions

Work orders can be started, completed, or put on hold or "parked" from the mobile application or the desktop. All actions can be taken by selecting the ellipsis icon.

Assigning a work order

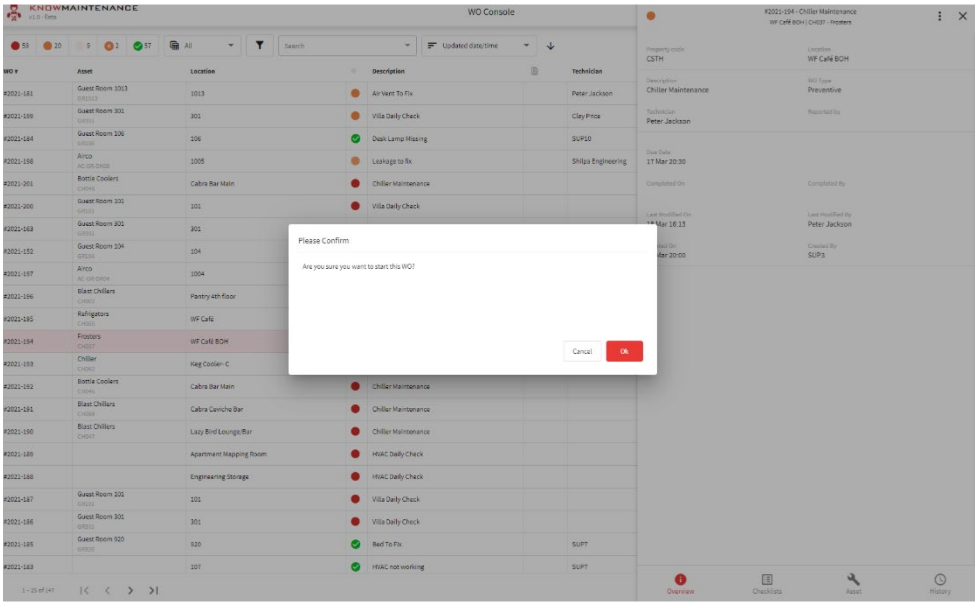
If the work order is unassigned, you can assign the work order by selecting the ellipses icon and selecting **Assign To**.

By default, only technicians are shown. Use the checkbox to select which technician is to be assigned and select the checkmark in the top right corner to confirm. If you wish to assign the work order to yourself, select **Assign to Self**.



Starting a work order

After the work order is assigned, the technician can begin work by selecting the **Start** button. After confirming this action, the work order is **In Progress**.

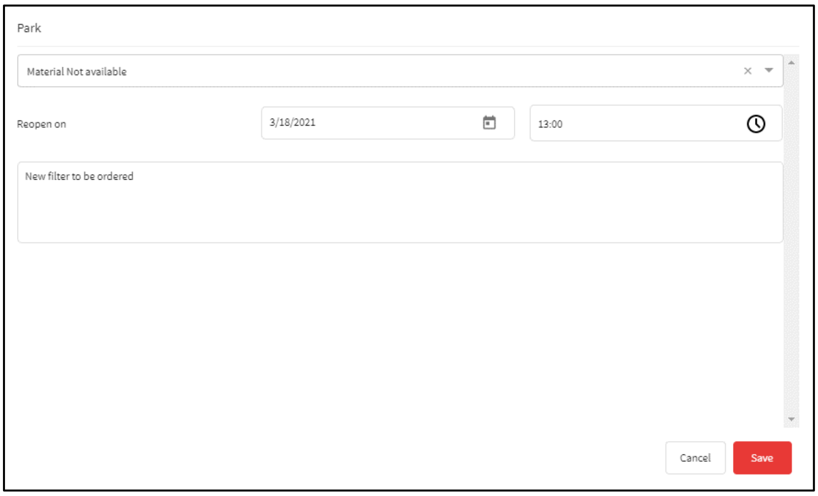


Note: You can start a work order from the mobile application or using the desktop software.

Parking a work order

The work order can be put on hold or "parked" to be completed at a future date and time.

To park a work order:

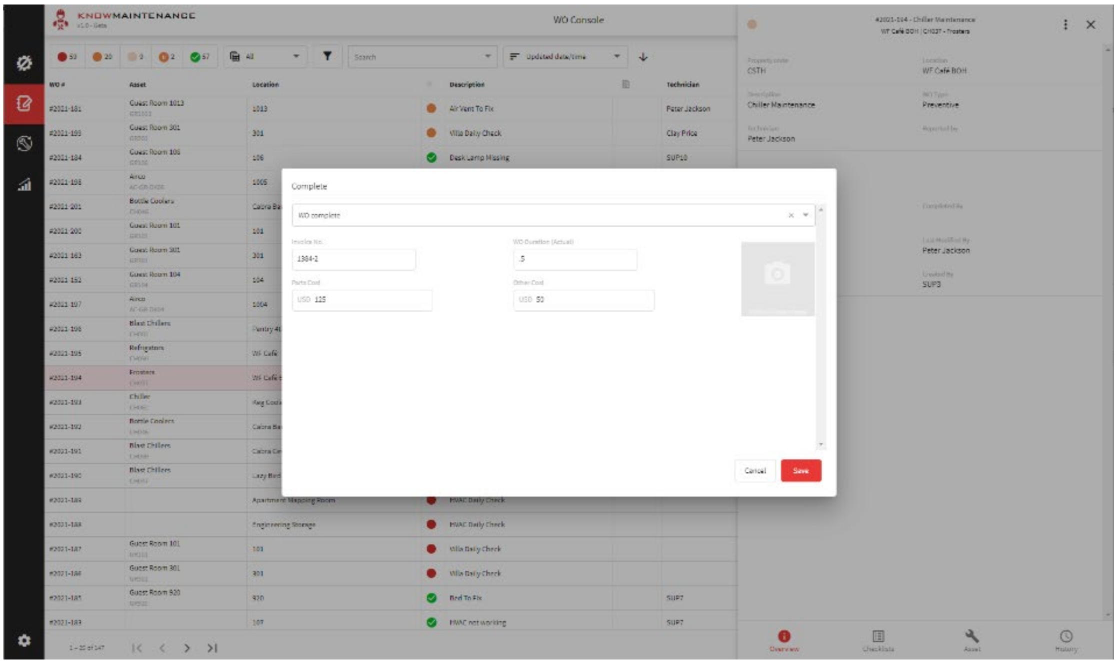


1. Select the ellipses icon and choose Park.
2. From the drop-down list, select your reason for parking the work order.
3. In the **Reopen on** fields, select the future date and time when the work order should be completed.
4. Enter notes as necessary.
5. Select **Save** to complete.
   The work order is parked.

> **Note:** A work order can be parked if the status is Assigned or In Progress.

Completing a work order

When a work order is finished, select **Complete** to close it. In the resulting confirmation dialog box, use the drop-down list to select a reason for the status change.



(Optional) Use the following fields to record additional information:

Invoice Number	Record the invoice number associated with the WO.
WO Duration (actual)	Enter the actual amount of time spend on the WO.
Parts Cost	Cost of parts used to complete the WO.
Other Cost	Other costs required to complete the WO.
Image	Attach a picture of the completed WO.

You can view completed WOs within a given date range. The system allows you to select a date range (which cannot be more than a month) to view all the completed WOs.

Select the **Complete status** button, and the system displays a date range search field to select the start date and end date.

> **Note:** The date range filter appears only for completed WOs. For other statuses, date range filters do not appear.

After selecting the start date, you can select only an end date for a month. After adding the end date, all completed WOs during the specified date range appear. For example, if you select November 3rd as the start date, you can only update the end date until December 2nd.

> **Note**: The system shows the recent seven-day results for completed WOs by default if date filter is not applied.

Work order bulk actions

You can perform bulk actions for the WO Console, Asset Console, and PM Console through which you can select multiple records and take a single action. This functionality is available on both web and mobile applications.

Bulk Action for users on WO Console

You can select multiple WOs by selecting the checkboxes. You can select up to 25 WOs from a single screen. If you go to the next screen, the software deselects all the selected WO from the previous screen.

Once you select multiple rows, you can view three different actions:

- Assign To
- Complete
- Park

Assign To

The Assign To action is used to assign the WO to a specific staff.

1. Select the **Assign To** action.
2. On the resulting screen, select the **Assign To** button.
3. From the drop-down list, select a particular staff and assign all selected WOs to that staff.
4. After updating the staff name, select **Submit**.

> **Note:** The Submit button will be disabled until all the selected WOs have been assigned.

Note: The Assign To action will work only if a selected WO is in one of the following statuses: Unassigned, Assigned, or Parked.

The software also includes the following filters to assign the WOs:

- **Department**—You can select the specific department you want to assign the WOs. After selecting the specific department, only staff belonging to the selected department appears. You can select only one department while assigning multiple WOs.
- **Skills**—You can select specific skills to filter the search for assigning the WOs. You can select only one skill while assigning multiple WOs.
- **Designation**—You can filter your search by selecting the designation of the staff for assigning the WOs. You can select only a single designation while assigning the bulk WOs.
- **Staff Shift On**—Select the checkbox for Staff Shift On to view only those staff who have logged in and started their shift.

After selecting the staff name, the system updates the name in all selected WOs. If you want to change the staff name for any specific WO, you can select it from the drop-down menu of a particular WO.

You can also delete any specific WO by selecting the delete icon. With this action, the system removes the WO from the bulk action.

Note: You can delete WOs one record at a time. You cannot bulk-delete WOs.

Complete

By selecting the **Complete** action, you mark all selected WOs as complete with a single click. You must select a specific reason and select **Update**. The system updates the selected reason in all selected WOs. You can also update bulk remarks, and the same will be added to all bulk WO after clicking Update.

WOs can be completed only if there is no action pending on the selected WOs. If a selected WO has a mandatory checklist or image pending, a corresponding error message (for example, “WO Checklist is pending” or “WO image in mandatory”) is displayed. In such a case, you must update the checklist/image for a specific WO and then select the WO again for bulk action.

Note: Complete actions will work only for the In Progress status.

Park

By selecting the **Park** action, you can park all bulk WOs in a single click. You must select a park reason, the date and time when system will reassign the WOs, and remarks (if any). After adding all the information, select **Update** to submit the request. The system updates this information and changes the status to Park for all selected WOs.

Note: Park action will work only for the following statuses: Assigned or In Progress.

Bulk Action for users on Asset Console

You can select multiple assets by clicking on the checkbox. You can select up to 25 assets from a single screen. If you go to the next screen, the system deselects all the selected assets from the previous screen.

Once you select multiple rows, you can view two different actions:

- Delete

- Print

Delete

Use the **Delete** action to delete all bulk assets in a single click.

> **Note:** You might encounter an error while deleting a bulk asset if any WO is open against them. In that case, first close the open WO. Then select the bulk asset again, and you will be able to delete.

You must provide confirmation by selecting the Yes button. This button will be enabled only if there is an asset selected for which there is no open WO.

> **Note**: The Yes button is disabled if any selected asset is associated with an open WO.

Print

You can also print the information for selected bulk assets by selecting the Export or Print PDF buttons. The system generates QR codes for all the bulk assets that you can scan and print individually.

You can also customize print details by selecting the Custom Print button, where you can select the below options to print with the QR code:

- Asset Code
- Asset Name
- Location Name
- Property Code

Bulk Action for users on the PM Console

You can select multiple PMs using the checkboxes. The system allows you to select up to 25 PMs from a single screen. If you go to the next screen and select multiple rows, you can view a single action:

- Delete

Delete

You can use the Delete action to delete all the selected PMs in single click.

> **Note:** You might encounter an error while deleting a bulk PM if any WO is open against them. In that case, first close the open WO. Then select the bulk PM again, and you will be able to delete it.

You must provide confirmation by selecting the Yes button. This button will be enabled only if there is a selected PM for which there is no open WO.

> **Note:** The Yes button will be disabled if any selected PM has open WOs.

Assign to Self option on WO

You can assign multiple WOs to yourself with a single click. After selecting multiple WOs, you can select the **Assign to Self** option. The system assigns all selected WOs to the logged in user.

> **Note:** You can also change the name of staff for an individual WO if required.

QR Code Scan Changes

Create a new WO

The QR code scan feature is available only in the mobile application. While creating a new WO, you will have an option to scan a QR code to add Asset to the WO.

When you select the scanner and scan the QR code, the system fetches the asset details for the scanned asset.

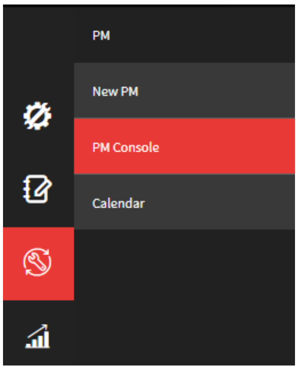
Prerequisite: The asset must be added in the Asset Console.

View pending WOs

You can view asset information for pending WOs. Select the WO and select the QR code scanner to scan the asset information.

Note: This functionality will not work for preventive WOs.

Preventive Maintenance



Setting up Preventative Maintenance Schedules, or PMs, is a key feature of the platform.

Preventive maintenance (PM) is the regular and routine maintenance of equipment and assets to keep them running and prevent any costly unplanned downtime from unexpected equipment failure.

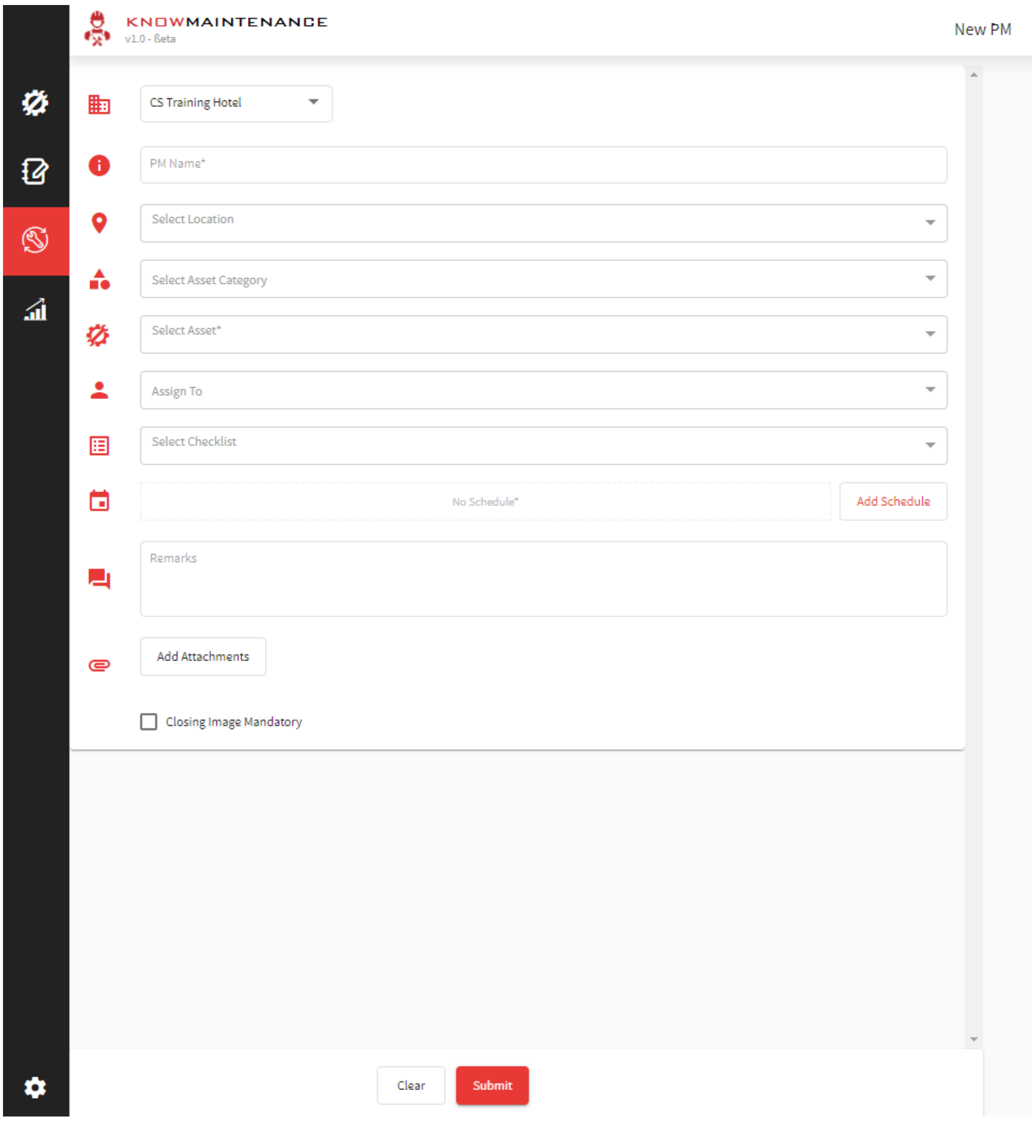
A PM will trigger a work order for each asset included in a PM.

Creating a new PM

From the PM menu, select **New PM**.

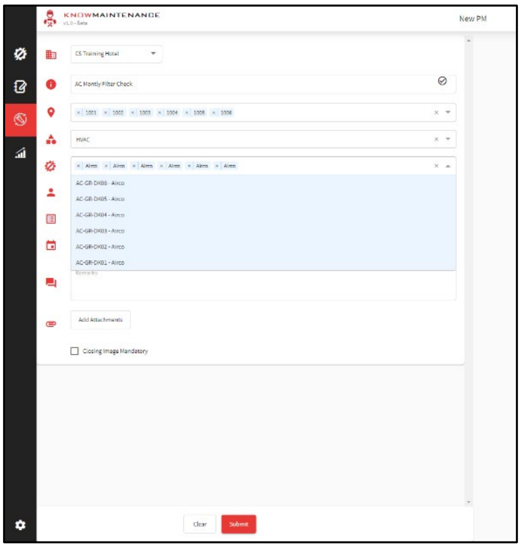
There are three mandatory fields:

PM Name	A unique name to identify the PM.
Asset	The asset(s) that are associated with the PM.
Schedule	The applied schedule for the PM.



Naming the PM and assets

The schedule name appears in the calendar and in the PM console. For this reason, Unifocus recommends creating a name that clearly explains the frequency and task to make the schedule easily identifiable. For example, you might name a PM “Quarterly AC Filter check” if you want filters on the air conditioner to be replaced once per quarter.



A PM is based on an asset(s), not on the location or asset category. When configuring your PM, the Location and Category are optional fields. However, including this information can assist with filtering the assets that you included in the PM.

In the **Location** field, select the location(s) for which you wish to see Assets.

In the **Category** field, select the category in which you want to view assets in the selected locations.

The asset tab now only shows you assets based on the chosen selected locations and category.

If you do not select a location and/or category, you will see all assets for your system.

You can associate multiple assets with the PM. Assets can belong to multiple categories.

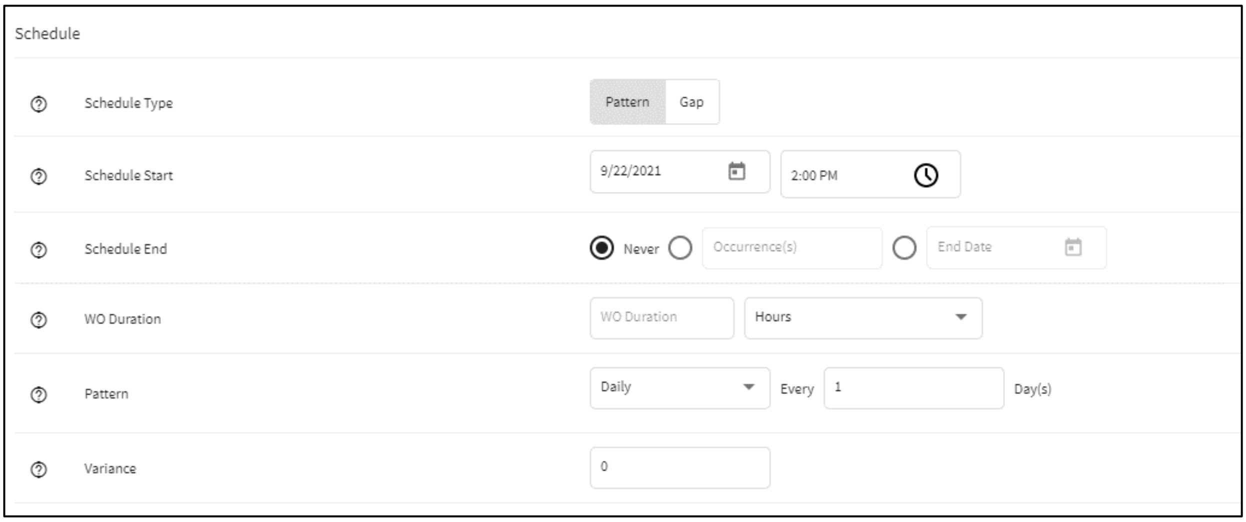
Because the PM creates a work order for each associated asset, selecting five asset results in five work orders based on the configured schedule.

Setting the schedule

Next, select **Add Schedule** to define the schedule. A schedule can be configured in one of two ways, as a Pattern- or Gap-based schedule.

A **Pattern** schedule triggers a work order based on a fixed date and time, such as first day of the month.

A **Gap** schedule triggers a work order when a set number of days have passed since completion of the previous work order, such as every 30 days.



Pattern

If you choose a pattern-based PM, start with defining when the PM needs to start. Set the date of the first run and the time that the work order should trigger if it is time sensitive. For example, you want to create an AM and a PM asset check.

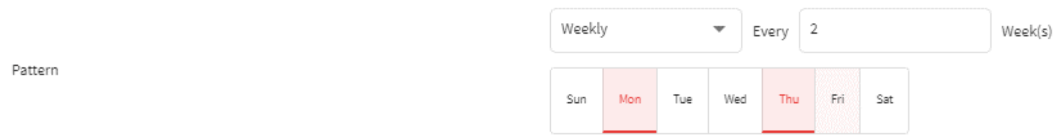
If the PM is not time sensitive, select **All Day Event**.

The **Schedule End** field can be used to define when the PM should end. That could be after a certain number of occurrences, a specified date, or never.

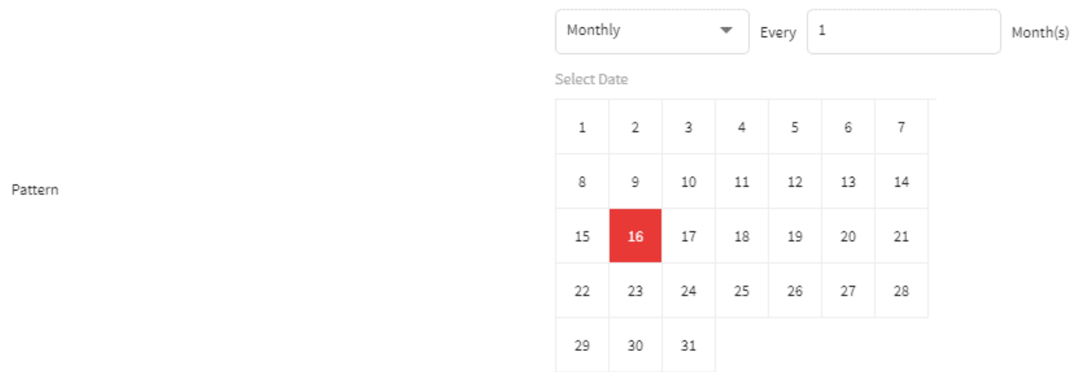
You can set the expected amount of time needed to complete the work order in the **WO Duration** field. Setting an expectation helps with planning and has an impact on when a WO is considered due. This setting can be configured in Hours or Days.

In the **Pattern** field, you define how often the pattern repeats. The pattern can be Daily, Weekly, Monthly, or Yearly. In the example below, a WO is created every 2 days, with the first instance occurring on the configured Start Date.

In the example below, a WO is created Mondays and Thursdays, every 2 weeks, from the configured Start Date.



If you want to set a Monthly pattern, select the date when the WO triggers. Then decide whether the pattern repeats every month or on an interval from the configured Start Date.



In the **Variance** field, you set a standard for an acceptable number of days that can pass between the creation and completion of a PM-generated work order. For example, a work order generated by a PM that is completed within 5 days is considered on time and compliant.

Select **Save** when done to return to the PM wizard.

Note: A pattern-based PM triggers new work orders based on the configured pattern, regardless of the status of previously generated work orders.

Gap

If you choose a gap-based PM, start with defining when the PM needs to start. Set the date for the first run and the time that the work order triggers if it is time sensitive. For example, you want to create an AM and a PM asset check. If the PM is not time sensitive, you can select **All Day Event**.

The **Schedule End** field can be used to define when the PM should end. That could be after a certain number of occurrences, a specified date, or never.

You can set the expected time for the work order in the **WO Duration** field, this will help with planning, and will have an impact on when a WO is considered Due. This can be configured in Hours or Days.

In the **WO Gap** field, enter the number of days between the work orders. In the example below, a new work order is created 7 days after the completion of the previous work order.

For example, if you need a certain work order to be completed every 7 days, and you can use a gap-based PM. If the PM triggers a new work order on Monday and the work order is completed on Wednesday, then a new work order is triggered the Wednesday, 7 days from the completion of the previous work order. Using a gap-based PM ensures that there is a minimum set number of days between subsequent WOs.

In the **Variance** field, you set a standard for an acceptable number of days that can pass between the creation and completion of a PM-generated work order. For example, a work order generated by a PM that is completed within 5 days is considered on time and compliant.

Select **Save** when done to return to the PM wizard.

Optional features

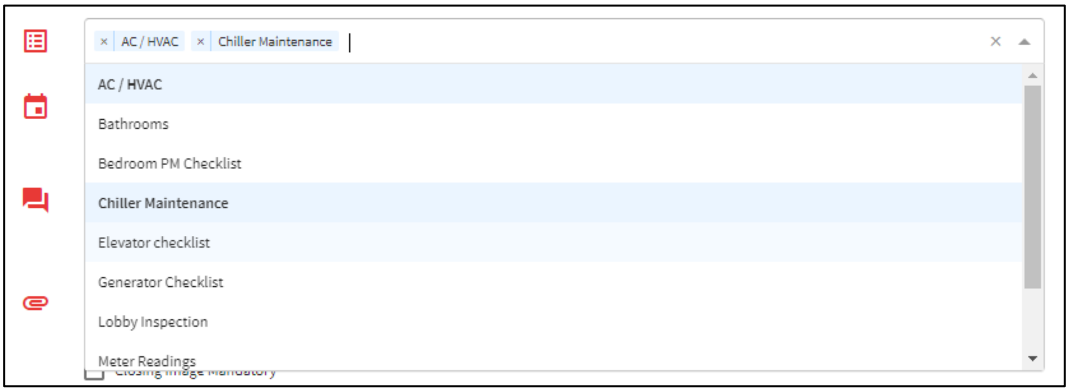
While the PM Name, Asset(s), and Schedule are mandatory, you can use the following optional fields to create a standard checklist or include additional information.

Selecting a default technician

If a PM must be assigned to a default technician, such as an air-condition specialist for an HVAC related PM, select a default technician using the **Assign To** drop-down list. By default, only Engineers are shown, use the toggle to see also staff from other departments.

Creating the checklist

Use the **Select Checklist** field to link one or multiple checklists to the WOs that will be created by this PM. You can add multiple checklists if needed. Select the **X** to remove a checklist if needed.



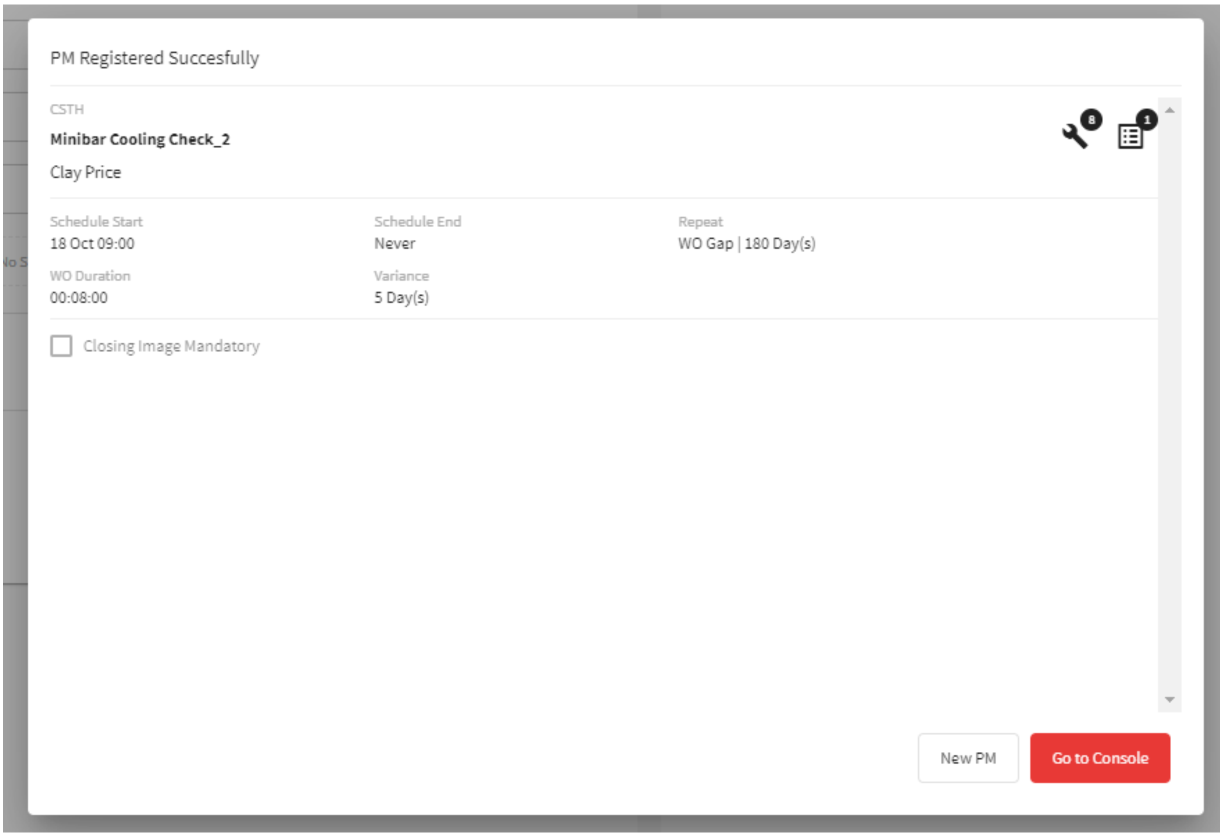
Adding remarks, attachments, and images

Enter detailed notes or instructions in the **Remarks** text box and/or attach an image or file using the **Add Attachments** option.

If you want the technician to include an image before closing the work order, select the **Closing Image Mandatory** checkbox.

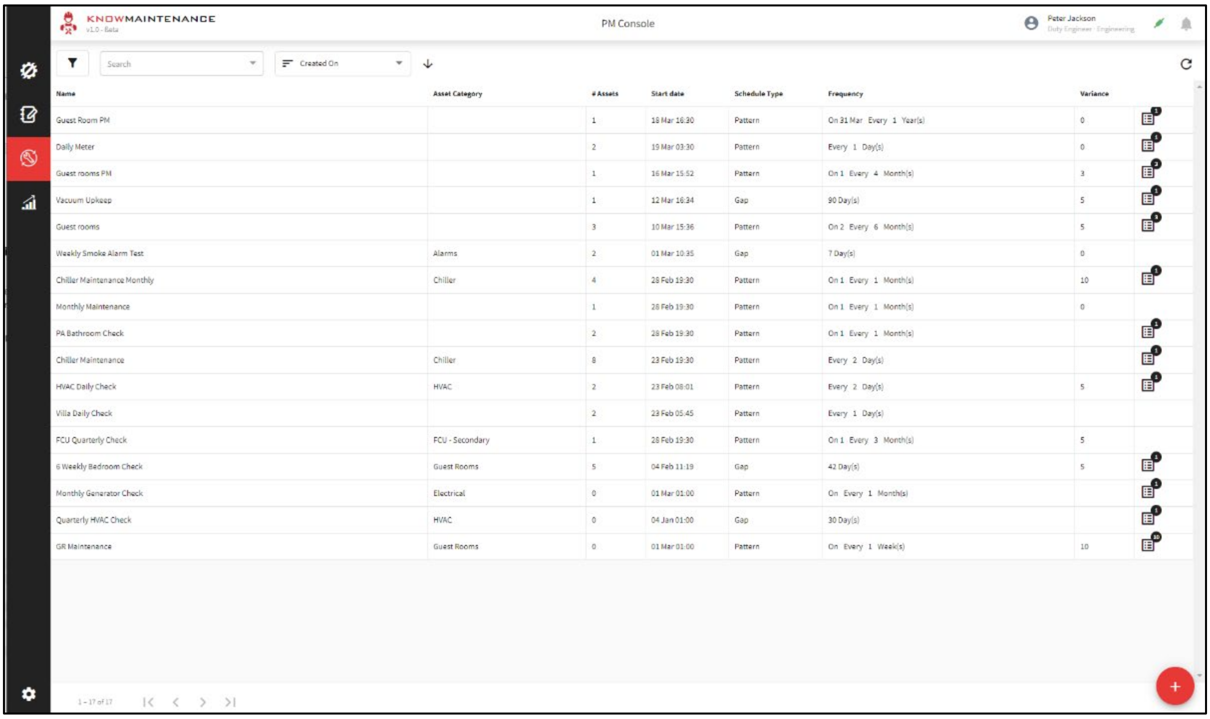
Submitting the PM

When you have completed the required fields, select **Submit** to save and activate the PM. A confirmation message appears when the schedule has been successfully submitted.



Preventative Maintenance console

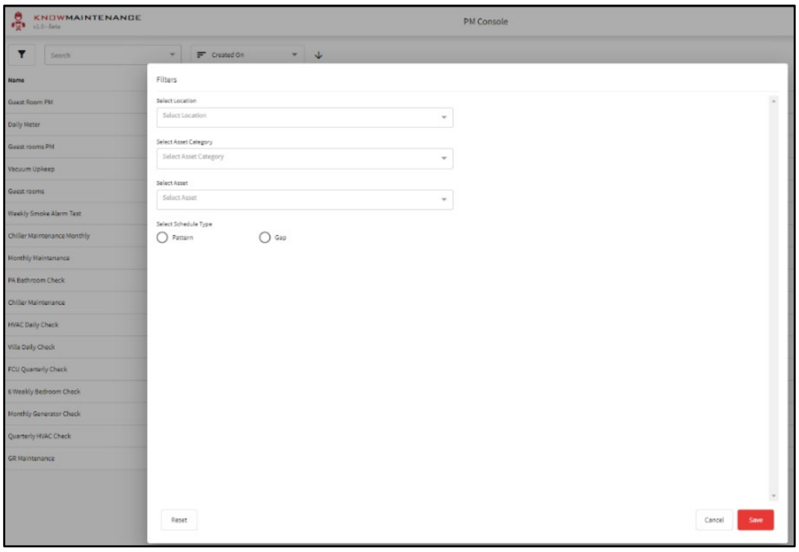
The Preventative Maintenance console is the place where you can view and edit all existing PMs. If you need to edit a PM or if you want to see what assets are included in the PM, you can do this from the Preventative Maintenance console. To access the console, select **PM Console** from the main menu.



The PM console displays all active PMs. You can apply filters, search, or sort the schedules to narrow down the list.

Filter

Select the **Filter** icon to access the PM Console filters. You can filter the PMs based on Location, Category, or Assets. You can also filter the list by PM Schedule type, Pattern or Gap. You can use a combination of multiple options. Select **Save** to apply the selected filters.



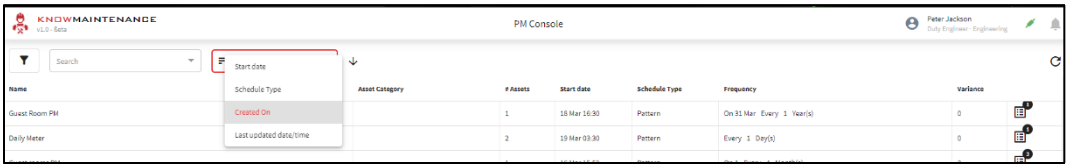
Search

You can use the **Search** bar to search for a Location or PM name.

If you search for a Location, you will see all PM schedules that include an asset that is registered to the specified location. For example, if you search room '101', you might find a 'Bedroom PM' that targets room 101 and an 'Airconditioning PM' that has an asset in room 101.

Sort By

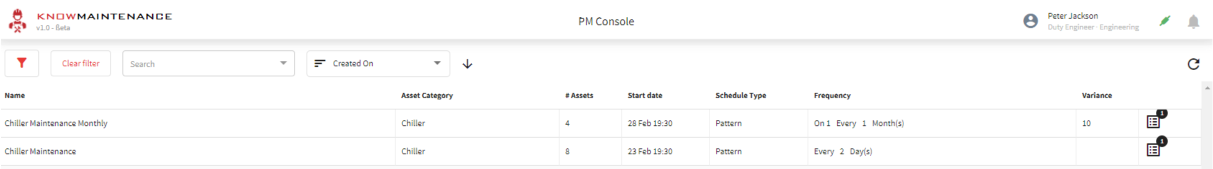
Sort the PMs by Schedule Type, Created Date, or Last Update date/time. You can use the arrow to change between ascending or descending order.



PM Console actions

From the PM Console, you can view the following information:

Name	Name for the Preventative Maintenance Schedule.
Asset Category	Applicable Asset Category.
# Assets	Number of assets included in the schedule.
Start date	Initial start date of the schedule.
Schedule Type	Schedule type – Gap or Pattern.
Frequency	Frequency of the schedule.
Variance	Allowed variance, in days.
Checklist	Number of checklists included.

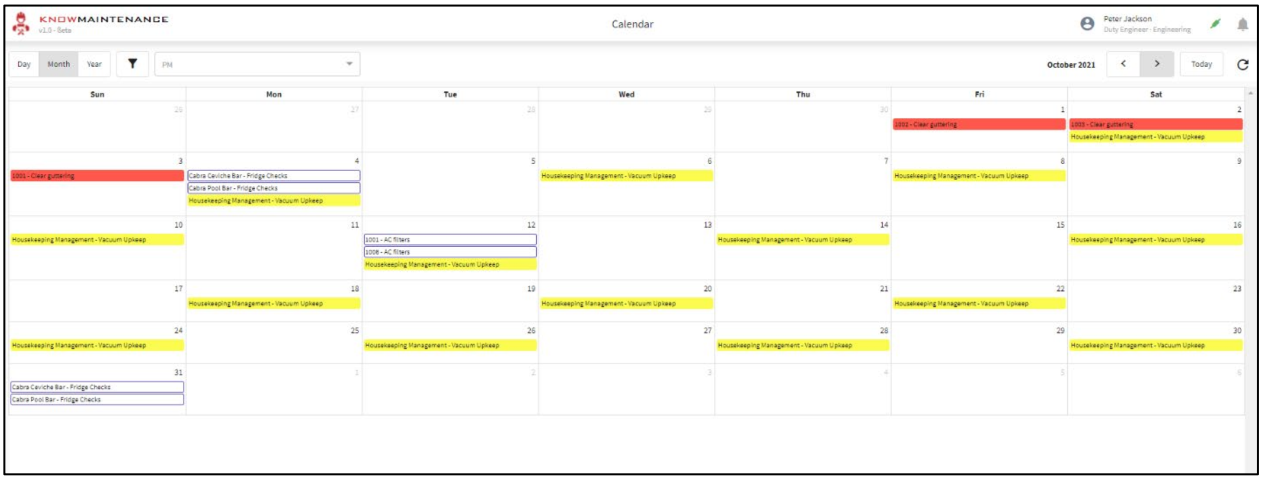


To see more information, including of what assets are included in a specific PM, select the PM that you want to view details for. A details pane opens with the following tabs available to you:

Overview	General information, including the exact schedule and date of creation.
Assets	List of all included assets for which a WO will be created.
Checklists	Checklists associated with the PM and all included questions.

Preventative Maintenance Calendar

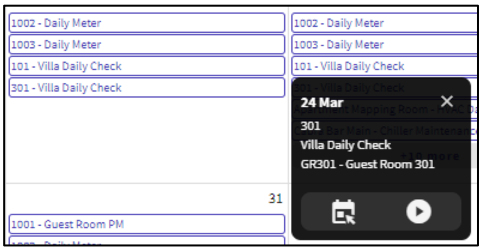
The PM Calendar is used to plan PMs. Active PMs are displayed in the corresponding date on the calendar. Different asset categories can be displayed using different colors to assist with easy recognition of different schedules.



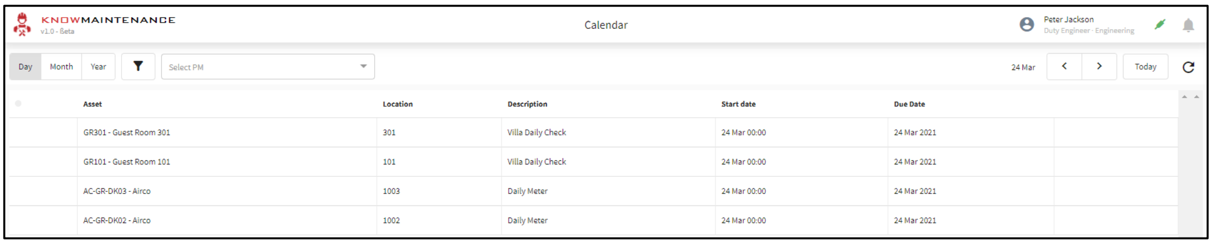
When you select a PM, an information box displays the relevant date, location, and asset.

If the PM is for a future date, you can use the calendar function to reschedule the work order.

Select **Start** to create a work order that begins immediately.

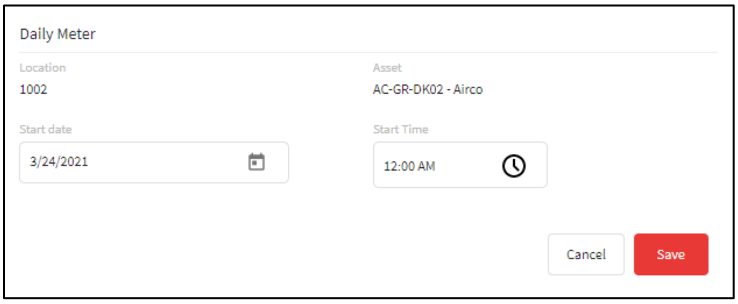


The default view displays the calendar by month. You can use the **Day | Month | Year** button to change the view. Selecting a day within the calendar opens the Day view for the selected date.The Day view displays all the work orders that will be generated that day.



If you hover over a scheduled work order in the Day view, a calendar icon appears at the far right.

Select the calendar icon to reschedule a work order.



The Year view shows you in totals the number of WO that will be generated for each month of the year.

PM Balance distribution

This feature automates the distribution of work orders (WOs) for the PM schedule and can be accessed through the New PM screen. You can choose between Balanced or Manual distribution modes.

If you select the Manual mode, you can create a PM schedule by adding multiple assets. The system generates all WOs on the specified date.

If you select the Balanced mode, you can create a single PM for a group of assets. The system automatically distributes the WOs over several days based on the number of WOs that can be completed within a day.

To use this feature, you must provide the PM name and Asset Category, and the system will display all the assets mapped under the selected Asset Category. You can select multiple assets under one PM.

After providing the mandatory information, select **Add Schedule**. You will be prompted to enter additional details such as the schedule start and end dates, WO duration, pattern, variance, and the number of WOs in a day.

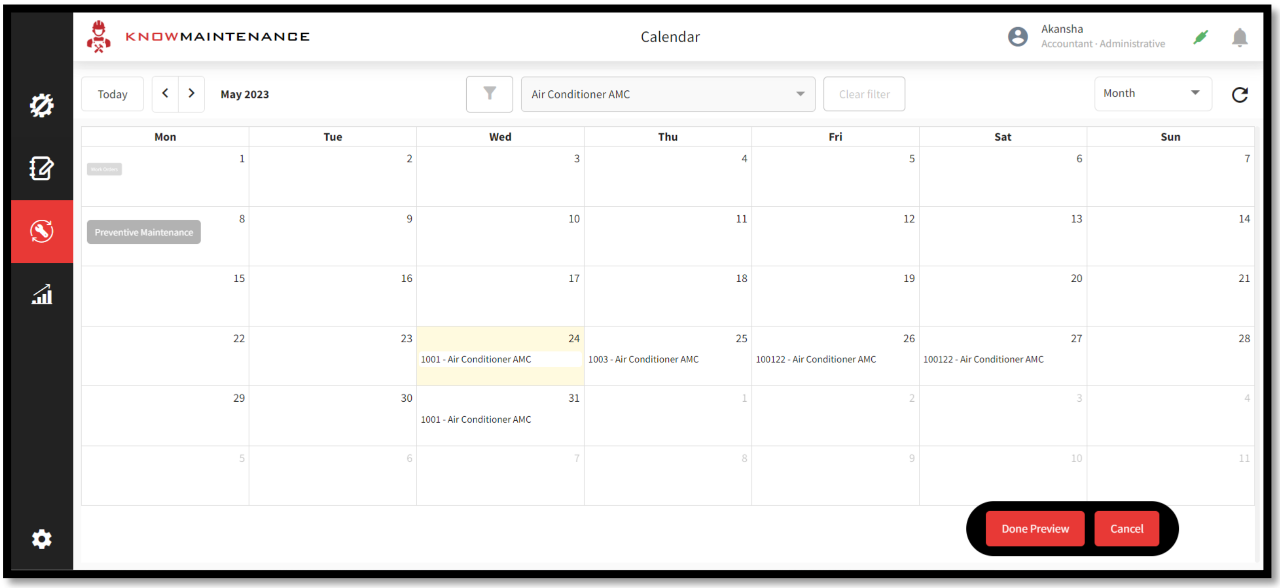
> **Note:** The *No. of WOs in a day* field is only be displayed in the case of Balanced distribution.

> **Note:** You can also select **Save**, and the system will reroute you to New PM screen.

Preview screen

Selecting the **Preview** button takes you to the Calendar screen. On this screen, you can view the WOs distributed according to the selected pattern (daily, weekly, monthly, or yearly), the number of WOs in a day, and the number of assets selected. Once you have previewed the WOs distribution, you can select **Done Preview**, and the system displays the New PM screen with the added schedule.

> **Note:** If you need to make any changes to the schedule while previewing it, click **Cancel**. You will return to the Add Schedule screen, where you can make the necessary changes.



PM Schedule creation

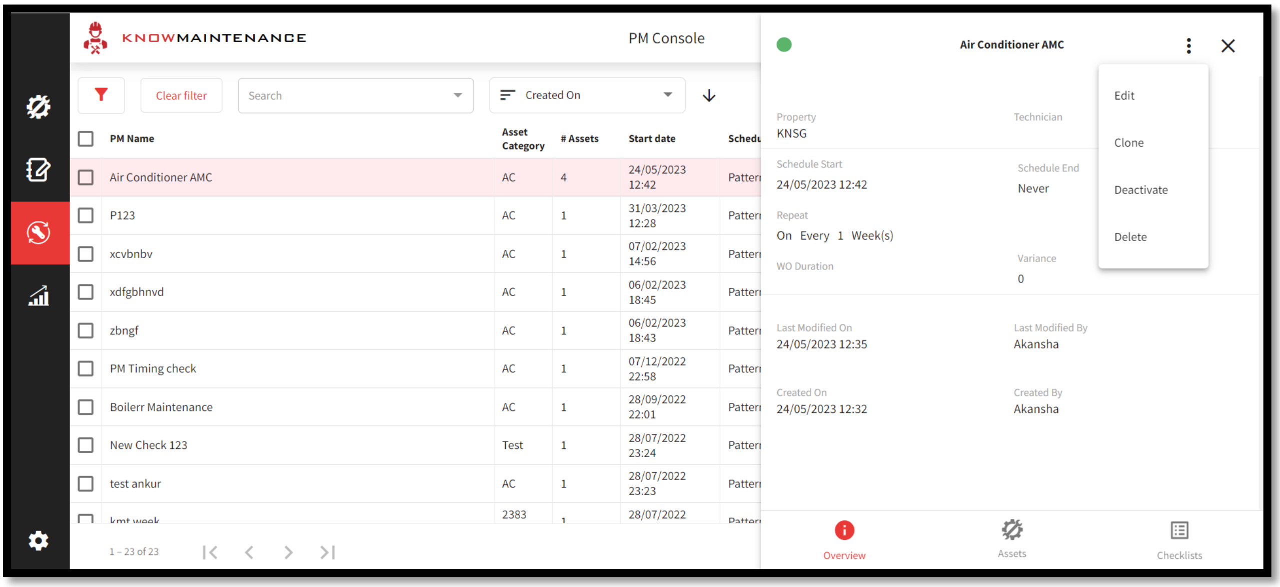
After adding the schedule and other necessary information on the New PM screen, you can complete additional details such as a checklist, attachments, technician, department, skills, and then select **Submit**. The system displays a confirmation message once the PM has been created.

Edit PM

To edit an existing PM, click **PM Console**. The system displays all PMs that have been created for the property. Select the **PM Name** and click **Edit**.

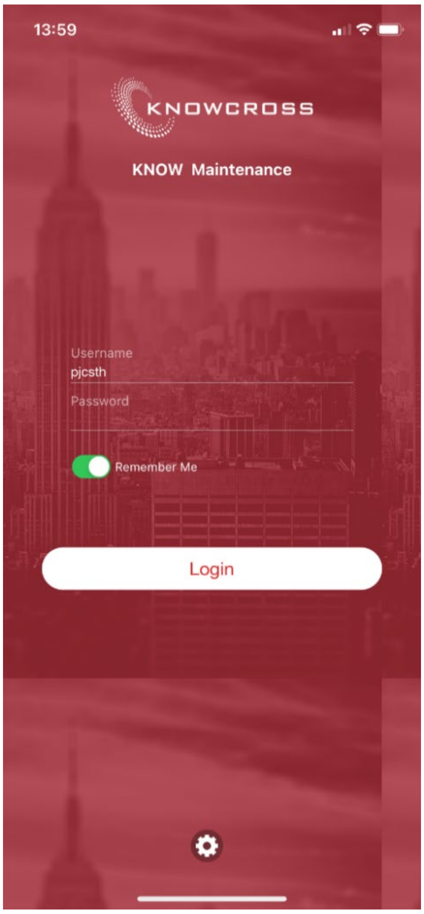
The New PM screen appears with all prepopulated fields. You can edit the Asset Category, Asset, Location, and other relevant fields. You can also edit the PM schedule, such as the start date, end date, and the number of WOs in a day.

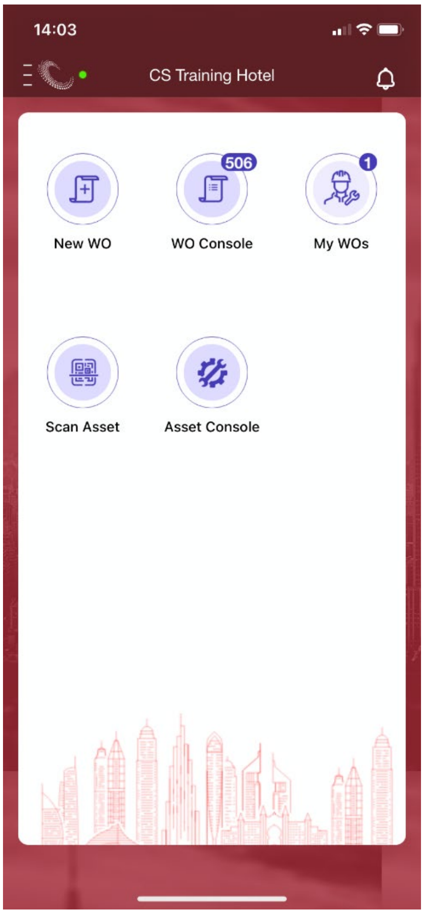
Note: The system will not allow you to change the mode of distribution. If a PM has been created with Balanced distribution, it cannot be changed to Manual, and vice versa.



The Maintenance mobile application

The mobile application is the tool that gives engineers access to the key functionality of the platform wherever they are.





Logging in to the app

Log in to the Maintenance app with your credentials. If you are using any other Unifocus products, please use the same username and password as for your other modules.

When you select **Login**, you are immediately directed to the My WOs menu. You can look at the main menu by tapping on the 3 lines at the upper left corner or by swiping from the left side of the screen. Tap on your name to go to the main menu of the Maintenance app.

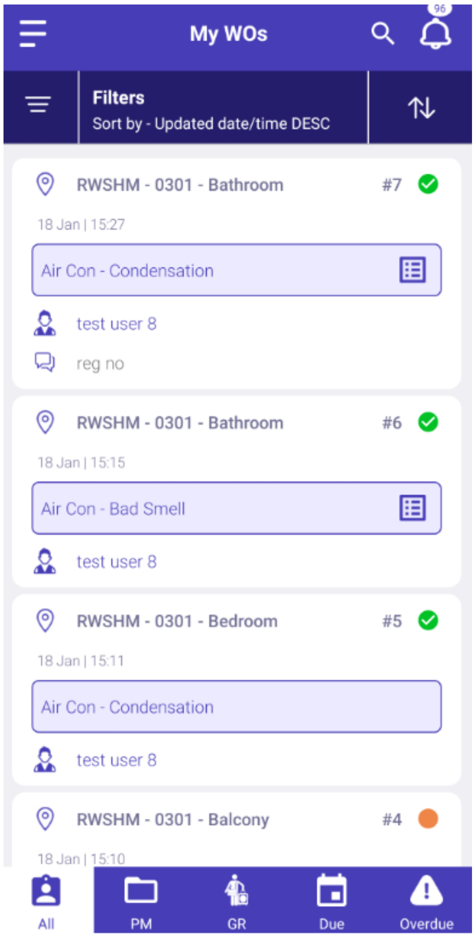
There are five options available from the main menu:

New WO	Create new work orders.
WO Console	View all work orders for the property.
My WOs	View your active work orders.
Scan Asset	QR code scanner for assets.
Asset Console	Database of all Assets.

You can access any of these options from the home screen or by using the main menu.

My Work Orders

The My WOs screen displays all work orders that were created by or assigned to you, sorted with most recently worked WOs appearing at the top of the list.



Each work order includes the following information:

- Location of the WO, WO number, and current status.
- Date & time of registration of the WO.
- WO Description with checklist, if applicable.
- Name of technician if the WO has been assigned.
- Registration remarks.

Status Indicators

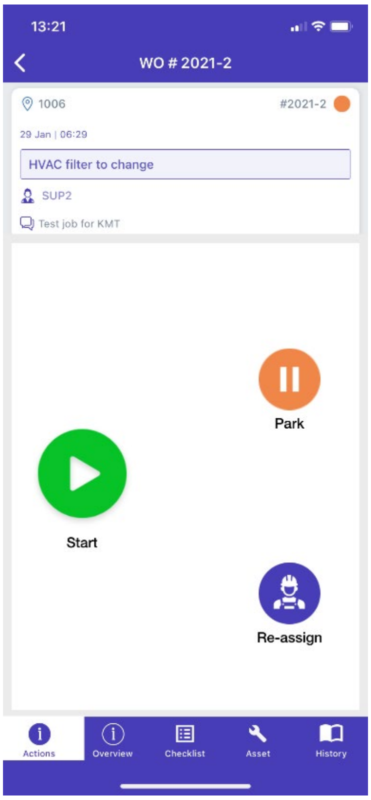
WO is registered but not assigned.
WO is registered and assigned.
(Blinking) WO is in progress.
WO is Parked (on hold).
WO is Complete.

You can can use the filters at the bottom of the screen to view:

All	All work orders assigned to the user.
PM	All work orders generated from by PM schedule and assigned to the user.
GR	All work orders generated for an occupied room and assigned to the user.
Due	All work orders that are due today and assigned to the user.
Overdue	All work orders that are overdue and assigned to the user.

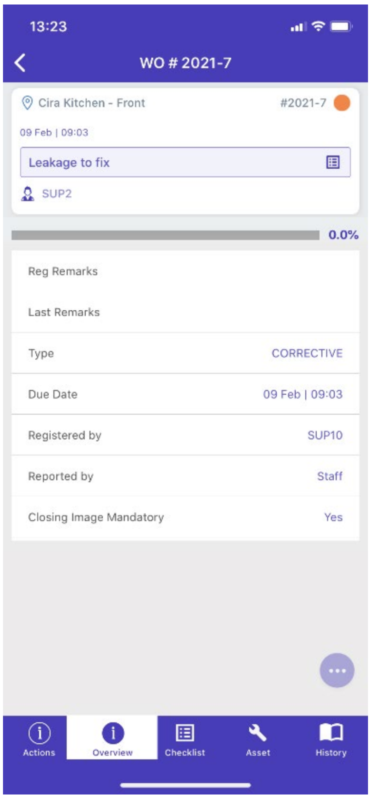
Note: The My WO screen works in the same manner as the WO console in the desktop software.

My WOs tabs



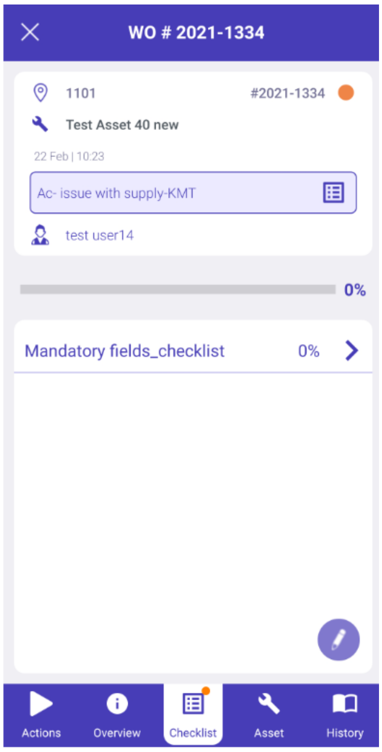
The Actions tab is the default tab for the My WOs screen. The Actions tab has three optionsStart, Park, or Re-assign.

Start	Start the work order (if the WO is assigned to you).
Park	Park the WO for a future time and date.
Re-assign	Assign the WO to an other staff member.



The Overview tab lists all key information about the work order, including any pictures or attachments that were added to the work order. The Overview tab provides the following additonal informaton:

Reg Remarks	Remarks added when WO was created.
Last Remarks	Last remarks added to WO.
Type	WO Type (Corrective / PM / Service).
Due Date	Date and time when the WO is due.
Registered by	Name of staff registering the job.
Reported by	Staff or Guest.
Closing Image Mandatory	Yes or No.

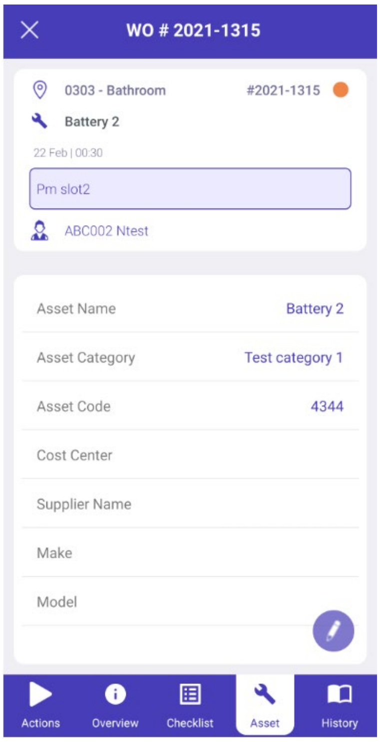


Use the Checklist tab to view and complete actions associated with the work order. Required items are marked with an asterisk (*). The Checklist tab displays all checklists associated with the work order.

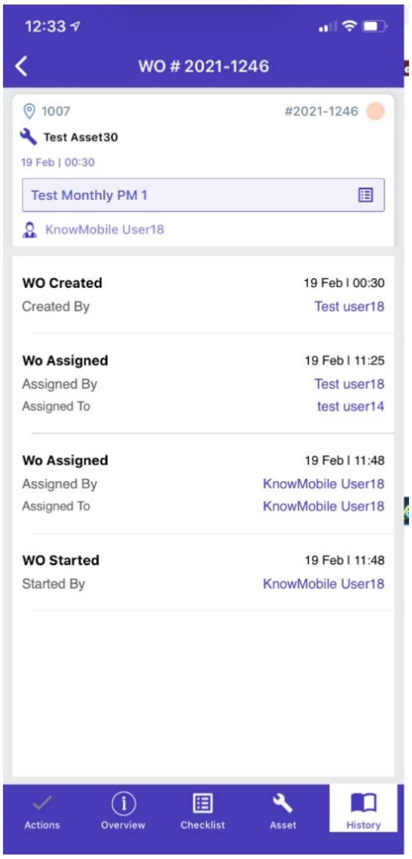
The percentage bar indicates the progress on the checklist. Only required items count toward progress.

The orange dot on the bottom ribbon indicates that there are pending items on the checklist.

You edit checklists associated with the WO. You cannot Edit checklists for a work order created by PM.

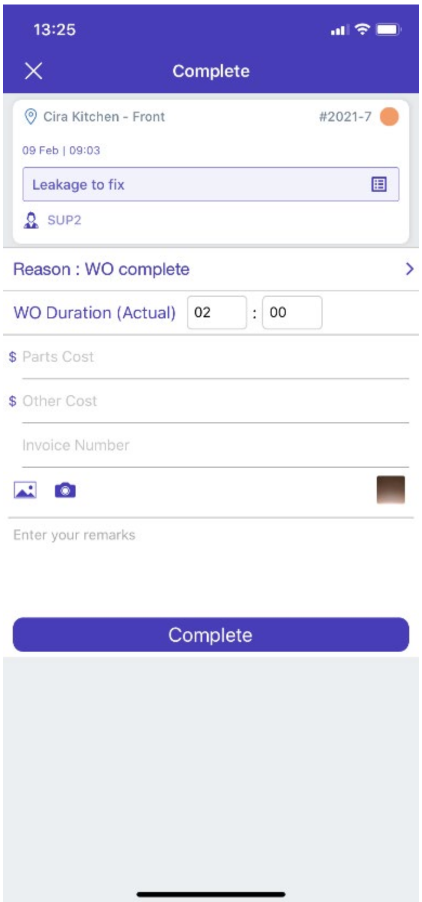


The Asset tab displays information about the asset. You can edit assets from this screen.



The History tab will list all work done on the WO in a chronological order. This includes all actions as well as remarks or attachments updated on the WO

Completing a work order



When you select **Complete** to close the WO, a new pane appears where you can udpate or add to the relevant details.

If no reason is selected for completing the WO, the system automatically applies the default reason, as defined by the property.

Adding Picture as Checklist response

This feature allows you to attach images and documents while updating a checklist response. Users can also add remarks (if required) to every checklist response.

This feature is available with the response types:

- Binary
- Rating
- Text
- Numerical

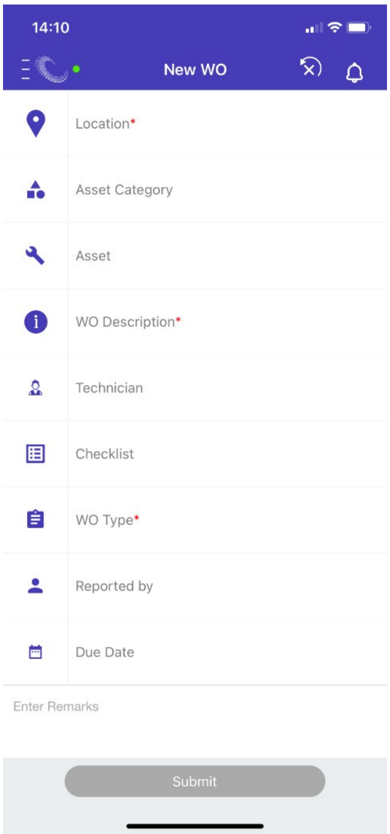
Select **In Progress** WOs to fill checklist responses on the Mobile Application. The system displays an icon to attach images or documents for each response.

With this feature, users will be able to attach multiple images and documents up to 10 MB and can also mention the remarks (if required).

> **Note:** You cannot delete the uploaded image or document once WO is completed. However, the system allows you to update or delete the same if WO is in an *In Progress* status.

Creating a new work order

To create a new work order from the mobile application, access the **New WO** screen from the main menu and complete the required fields.



Required fields:

Location	Location for the WO.
WO Description	Description of the WO.
WO Type	Type of WO.

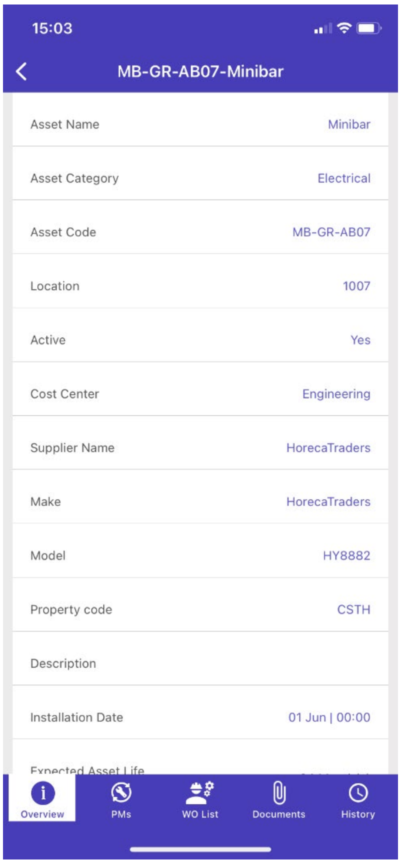
All other fields are optional and should be used when applicable. When selecting assets, please note that the Location and Asset Category can be used in combination to filter down the asset list.

Optional Fields:

Asset	Select the asset to be maintained.
Technician	Technician assigned the WO.
Checklist	Link one or more checklists to the WO.
Reported By	Staff member who reported the WO.
Due Date	Date by which the WO should be completed.
Remarks	Notes about the WO.
Closing Image	Determine whether a closing image is required.

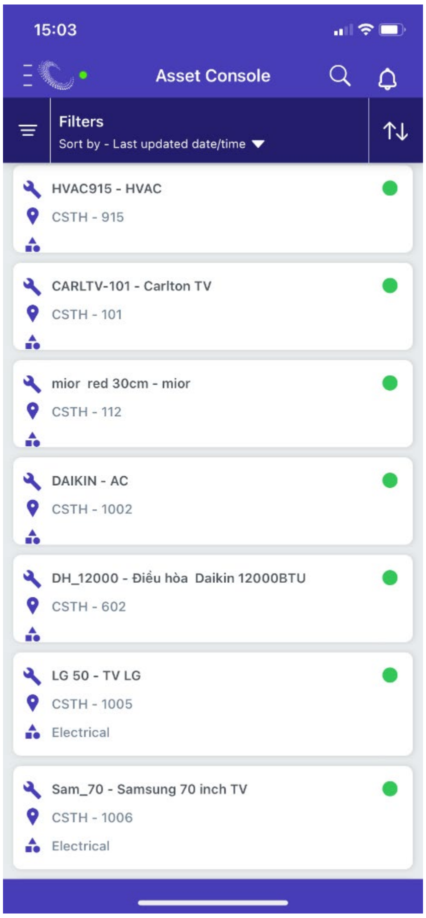
A confirmation message appears when the WO has been registered successfully.

WO Console



The WO console provides the same information as the My WO console but for all users in the property. Use the filters, sort options, or the search bar to locate a certain work order.

All other actions are still available.



Asset console

The Asset console is a mobile list of all registered assets at the property, both active and inactive. The colored dots on the right side signify their status:

Green	Active.
Red	Inactive.

Use filters, sort options, or the search bar to find your assets. Select an asset to view detailed information.

Overview	Registered asset information.
PMs	All PMs for the asset.
WO List	All WOs created for this asset (read-only).
Documents	All registered documents for the selected asset.
History	Asset system history.

Scan Asset

If your assets have been provided with a Maintenance QR code, you can use the **Scan Asset** function to scan the QR code. The QR code directs you to the Asset Details on your device.

Create a new WO

The QR code scan feature is available only in the Mobile Application. While creating a new WO, you have an option to scan the QR code to add the asset to the WO.

Select the scanner and scan the QR code. The system fetches the asset details for the scanned asset.

Prerequisite: The asset must be added in Asset Console.

View pending WOs

You can view asset information for pending WOs. Select the WO and click the QR code scanner to scan the asset information.

Note: This functionality will not work for preventive WOs