

MAINTSTAR VERSION 15

Work Orders

Navigating the MaintStar System and Creating Work Orders

MAINTSTAR

28 Hammond
Irvine California 92618

Phone: 800-255-5675
Email: WWW://Maintstar.com

Table of Contents

Section	Page
Log On	3
Work Group	4
Work Orders	6
List view and Card View	7
Work Order Screen - Search Section	8
Work Order Screen - Tabs Section	11
Work Order Screen - Header Section	12
Work Order Screen - Asset Section	13
Work Order Screens - Task Section	14
Quick Look up	15
Starting a new Work Order	16
Making and deleting entries in fields	18
Searching in a field	19
Adding Assets	20
Adding LEM	24
History	26
Job site	27
Request tab	28
Related tab	29
Notifications	30
Plan	30
Log	31
Attachments	32
Issues and Answers	34
PM Scheduling	35
Templates	36
Nesting	46
Scheduling	50
Automatic Batch Issuing	52
PM Reports	54

Log on

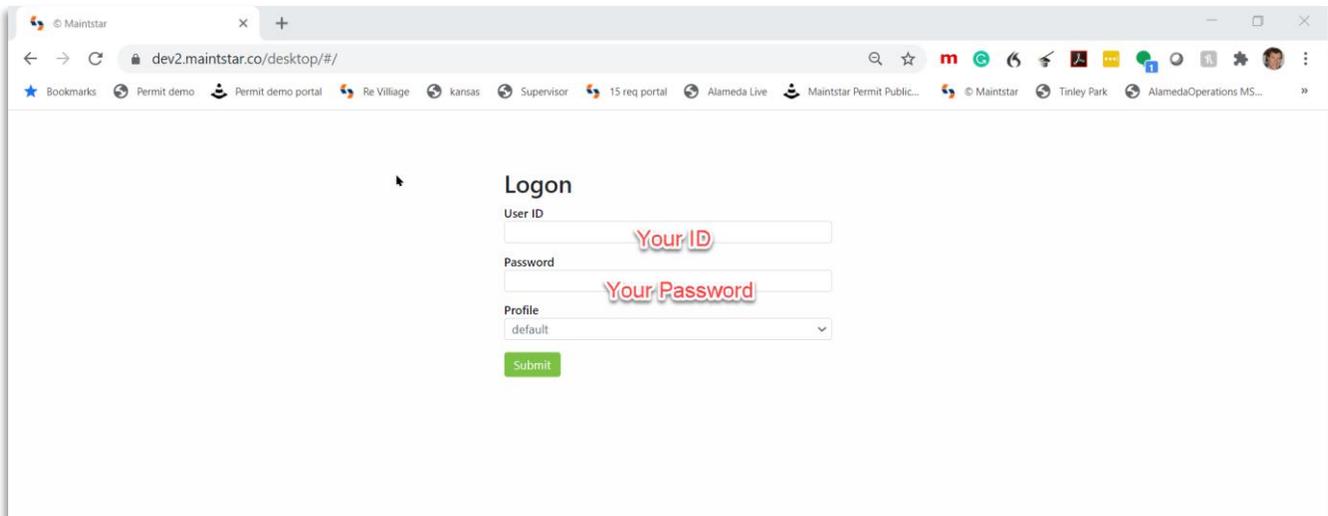
To <https://dev2.maintstar.co/desktop>

Enter Your User Id and Password and Select your Work Group

Enter your Id and password

Select the 'Profile' you want to log into from the drop down. You may have only one profile, or you will have more than one if you have a production and a test environment for example.

Press 'SUBMIT'. You will be taken to the Home Screen.



The screenshot shows a web browser window with the URL dev2.maintstar.co/desktop/#/. The page title is "Logon". The form contains the following fields:

- User ID: (placeholder: Your ID)
- Password: (placeholder: Your Password)
- Profile: (dropdown menu)
- Submit:

New Concept: The Workgroup

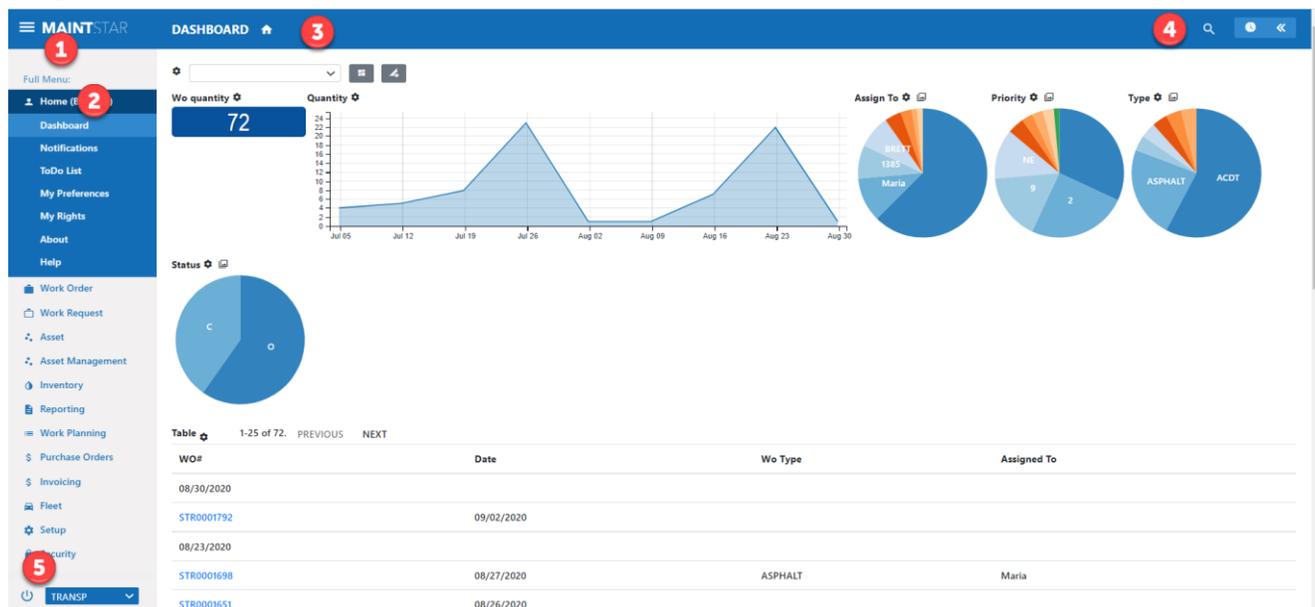
The 'Workgroup' is a new concept in version 15.

It is in some ways like the "Modules" in version 14 and earlier. The "Modules" separated the system into different groups of assets that different agency departments would be working with. Each of these modules had their own set of work orders and PMs. The "Modules" in version 14 were preset in the system for Water, Storm Water, Streets, Sewer, Parks and the Regular work order.

In version 15, MaintStar now allows you to create your own groups. They are now called "Work Groups". You can define your work groups the way you structure your business. You are no longer forced into the preset categories.

If your street crew also maintains storm water assets, they can be combined in one work group. If you had several groups sharing the regular work order, each of these groups can now have their own workgroup identity with select assets, screen layout and printed work order form, independently. The workgroups are created in the setup module and will be described in a different document.

System Home Screen



1. The Hamburger in the upper left of the screen toggles the menu for full width or condensed view.
2. The label: "Full Menu" expands the menu. The label will change to "My Menu". Click on "My Menu" to change to a short version of the menu. Click on the section headers to expand or contract them.
3. The Label at the top shows what screen you are on. You can set the dashboard or a map as the home screen.
4. The Arrow in the upper right, opens a sliding panel. The panel can be set to be the dashboard or a map. Note that the dashboard automatically displays data for the workgroup selected in the workgroup dropdown. Hold down your mouse to stretch the map wider. Note: You can open the map while you are looking at work orders or in other parts of the system.
5. Log off the system. This is the selection of which work group is displayed.

Work Orders

1. Click on the menu section **Work Order**.
2. Then click the first menu item: **Work Order**.

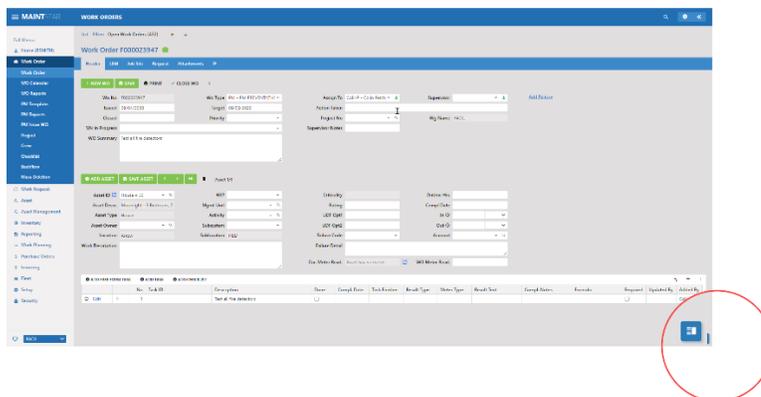
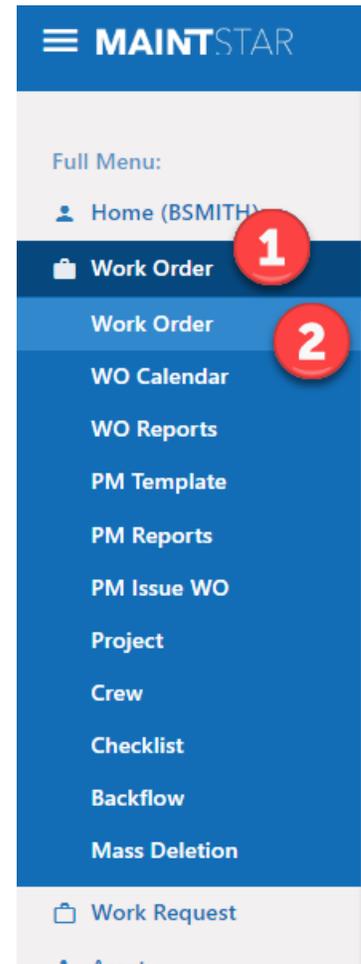
The Work Order screen will open.

NOTE: There are two different views of the work order screen.

The Grid view has a search table at the top of the screen and the selected work order from the table is shown at the bottom of the screen.

The Card view shows the work orders from the filtration in little cards to the left of the work order.

You can switch between the two views with the icon on the lower right of the screen.



Work order in the List view

Work Order displayed below

WO #	Asset Id	Asset Type	Description	WO Type	Priority	Assigned To	WIP	Status	Issued	Closed	Upd Date	Add Date	Added By
F000023978	Floor-01	Building						O	09/15/2020		09/15/2020 10:15	09/15/2020 10:15	Maria
F000023979	Floor-01	Building						O	09/15/2020		09/15/2020 10:15	09/15/2020 10:15	Maria
F000023977	UNKNOWN	UNKNOWN	Repair			SMITH	WL	O	09/14/2020		09/14/2020 12:34	09/14/2020 12:34	BSMITH
F000023976	Floor-01	Building						O	09/12/2020		09/12/2020 14:55	09/12/2020 14:55	Admin
F000023974	Village Hall	Building	Repair			SPRATER	WL	O	09/09/2020	09/09/2020	09/09/2020 11:11	09/09/2020 11:11	BSMITH
F000023973	UNKNOWN	UNKNOWN					WL	O	09/09/2020		09/09/2020 11:08	09/09/2020 11:08	BSMITH
F000023971	Floor - 1	FLOOR	Fixed Schedule	ACDT	2	ADELEON		O	09/07/2020		09/07/2020 14:28	09/07/2020 14:28	System
F000023970	Floor - 1	FLOOR	Fixed Schedule	ACDT	2	ADELEON		O	09/07/2020		09/07/2020 14:10	09/07/2020 14:10	System
F000023969	Floor - 1	FLOOR	Fixed Schedule	ACDT	2	ADELEON		O	09/06/2020		09/06/2020 16:07	09/06/2020 16:07	System

Work Order F000023970

Details: LEM Assets History Job Site Request Plan Issue/Action Status Related Attachments Log Notifications

NEW WO SAVE PRINT CLOSE WO

Wo No: F000023970 Wo Type: ACDT - TRAFFIC ACCIDI Assign To: ADELEON - Anglic Supervisor: Add Picture

Issued: 09/07/2020 Target: 09/07/2020 Action Taken: Project No: Wg Name: FACIL

Closed: Priority: 2 - Medium Supervisor Notes:

Wk In Progress: WO Summary: Fixed Schedule

ADD ASSET SAVE ASSET ASSET 1/1

Asset ID: Floor - 1 WIP: Criticality: Dntime Hrs: Compl Date: UDF Opt1: UDF Opt2: Asset Descr: Floor - 1 Mgmt Unit: Rating: UDF Opt: UDF Opt2: Asset Type: FLOOR Activity: Failure Code: Account: Asset Owner: Subsystem: Location: Sublocation:

Work Order in the Card view

Work orders displayed on cards

Open Work Orders 1-10 of 447

Work Order F000023970

Details: LEM Assets History Job Site Request Plan Issue/Action Status Related Attachments Log Notifications

NEW WO SAVE PRINT CLOSE WO

Wo No: F000023970 Wo Type: ACDT - TRAFFIC ACCIDI Assign To: ADELEON - Anglic Supervisor: Add Picture

Issued: 09/07/2020 Target: 09/07/2020 Action Taken: Project No: Wg Name: FACIL

Closed: Priority: 2 - Medium Supervisor Notes:

Wk In Progress: WO Summary: Fixed Schedule

ADD ASSET SAVE ASSET ASSET 1/1

Asset ID: Floor - 1 WIP: Criticality: Dntime Hrs: Compl Date: UDF Opt1: UDF Opt2: Asset Descr: Floor - 1 Mgmt Unit: Rating: UDF Opt: UDF Opt2: Asset Type: FLOOR Activity: Failure Code: Account: Asset Owner: Subsystem: Location: Sublocation:

Work Description: Cur. Meter Read: Asset has no meter WO Meter Read:

ADD FREE FORM TASK ADD TASK ADD CHECKLIST

The Work Order Screen

Table View

The screenshot shows the 'WORK ORDERS' screen in 'Table View'. The top navigation bar includes a search filter 'List Filter: Open Work Orders (435)' (1). Below this is the work order header 'Work Order F000023948' (2). The main form area contains fields for 'NEW WO' (3), 'ADD ASSET' (4), and a table (5). A thumbnail image of fire extinguishers is visible (6).

No	Task ID	Description	Dose	Compl. Date	Task Finisher	Result Type	Meter Type	Result Text	Compl. Notes	Formula	Required	Updated By	Added by
1		Test all fire detectors											ColinP

Section 1. The Search Section

- The work order **Search Section** sits on top of the screen. It displays or hides a filtered list of work orders. Click on the label “List “to display or hide the list.



- The work orders that are in the list will be seen in the list while you are in the list view mode. The same work orders that are in the list will be displayed as cards while you are in the card view mode.

Which mode works best for you is something for you to decide. The card view is great when you have a shorter list of work orders to work with. The cards are great when you want to move from one to another by clicking the card directly. The card view displays thumbnail pictures of your primary attachment.

The list view shows you more information in the grid table. You can move up and down through the work orders with the left and right arrows.

- Here the list is shown open. The work order that is highlighted in the list is displayed in the Work Order section below. The arrows move you up and down through the workorders in the search list. This is very similar the “Make a scrolling list” feature that was very popular in previous versions of MaintStar.

To filter the list, click on the word 'filter'.

WO #	Asset ID	Asset Name	Location	WO Type	Priority	Assigned To	WIP	Status	Issued	Closed	Upd Date	Add Date	Added By
F000023972				ADA	2		WL	O	09/07/2020		09/07/2020 21:42	09/07/2020	ColinP
F000023971				ACDT	2	ADELEON		O	09/07/2020		09/07/2020	09/07/2020	System
F000023970	Floor - 1	FLOOR	Fixed Schedule	ACDT	2	ADELEON		O	09/07/2020		09/07/2020	09/07/2020	System
F000023969	Floor - 1	FLOOR	Fixed Schedule	ACDT	2	ADELEON		O	09/06/2020		09/06/2020	09/06/2020	System
F000023968				ACDT	2	ADELEON		O	09/04/2020		09/04/2020 01:12	09/04/2020 01:12	System
F000023967				ACDT	2	ADELEON		O	09/04/2020		09/04/2020 01:06	09/04/2020 01:06	System
F000023966				ACDT	2	ADELEON		O	09/04/2020		09/04/2020 01:00	09/04/2020 01:00	System
F000023947	House # 33	House	Test all fire detectors	PM		ColinP		O	09/04/2020		09/02/2020 03:30	09/02/2020 03:30	ColinP
F000023948	House # 35	House	Test all fire detectors	PM	HS	ColinP	SCHED	O	09/04/2020		09/02/2020 03:30	09/02/2020 03:30	ColinP

This will open some search fields. Here you can select open close or both for Status. Asset ID, Activity and other fields. The results list will change automatically as you make selections.

Open Closed Both

WO #
 Assigned To
 Location
 Mgmt Unit
 Material

WO Type: CM - CORRECTIVE
 Asset Id: House
 Address:
 Activity:
 Contractor:

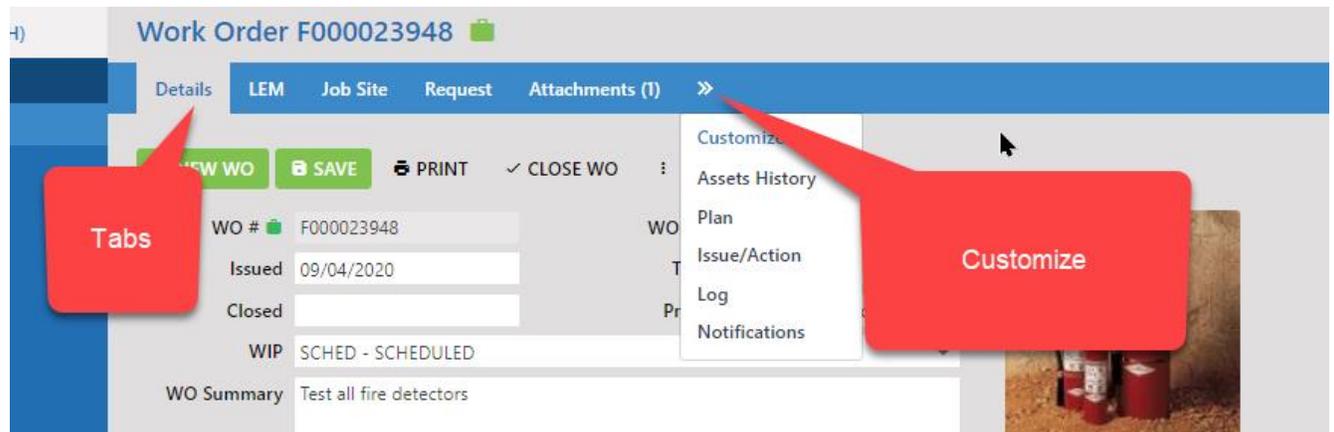
WO Description:
 Asset Type: House - All Village
 WIP:

WO #	Asset ID	Asset Name	Location	WO Type	Priority	Assigned To	WIP	Status	Issued
000002126	House						APPR	O	07/04/2020
000002120	House							O	07/02/2020
000002075	House							O	06/21/2020

The screenshot displays a software interface for managing work orders. A dialog box titled "Add / Remove columns (Open Work Orders)" is open, allowing users to customize their search criteria. The dialog includes radio buttons for "Open", "Closed", and "Both" views. Below these are several search fields, each with a wrench icon to remove it. The fields include: WO #, Assigned To, Location, Mgmt Unit, Material, WO Type, Asset Id, Address, Activity, Contractor, WO Description, Asset Type, WIP, Technician, and Issued (From/To). An "Add New Field" dropdown menu is open, listing various fields such as Account, Action Taken, Actual Finish, Actual Start, Added By, Added Date, Approved By, Asset Descr., Asset Notes, Asset Sub Status, Asset UDF1, Asset UDF2, Closed, Color, Crew Leader, Customer, HP, Issue, and Lic. No. The background shows a work order detail view for "House # 33" with fields for Site, Request, Attachments, and a list of work orders.

You can add additional fields to search on with the wrench tool. Click the wrench and you get a pop-up window. Here you can add an additional field to the search as needed.

Section 2. The Work Order Tabs



The work order is broken into a series of tab sections across the top.

- **Header** is the primary work order section.
- **New Term: LEM** stands for Labor, Equipment and Material. Your labor, equipment, contractors, materials and work quantity are now together on the same screen. Work planning users will be glad to see that Management unit and Activity are now on the labor line. This means you can have multiple Activities in the same work order!
- **Job site** is to indicate where the work is being done by address.
- **Request** tab - If the work order started as a request, the information from the request will be here.
- **Attachments** stores pictures and files attached to the work order.
- The double arrows open a drop down with additional tabs for asset history, Planning, Issue/ actions, Log and Notifications. These less used tabs are here to keep the screen simpler. If you want them to be shown you can click on one in the list. It will open the tab.
- **Notifications** lets you activate a variety of notifications to staff for the work order.
- **Plan** Allows you to record estimated costs and compare them to actual costs.
- **Log** records history of data changes to the work order.
- **Status** records changes to the work in progress and work order assignment and other related events.
- **Issues and Actions** records cause and solutions about the work order. This is optional.

The screenshot shows the MAINTSTAR WORK ORDERS interface. The main header section (1) displays the work order ID 'E000023948'. The task details section (2) includes fields for 'Wk No', 'Issued', 'Target', 'Closed', 'Wk In Progress', and 'Wk Summary'. The asset details section (3) includes fields for 'Asset ID', 'Asset Desc', 'Asset Type', 'Asset Owner', 'Location', 'Mgmt Unit', 'Activity', 'Subsystem', 'Failure Code', and 'Failure Detail'. The task list section (4) includes fields for 'ADD FREE FORM TASK', 'ADD TASK', and 'ADD CHECKLIST'. The task table (5) has columns for 'No', 'Task ID', 'Description', 'Done', 'Compl. Date', 'Task Finisher', 'Result Type', 'Meter Type', 'Result Text', 'Compl. Notes', 'Formula', 'Required', 'Updated By', and 'Added By'. A small image of a fire extinguisher is shown in the top right corner (6).

Section 3. The Work Order Header

The header section contains basic information about the work order such as issue date, target date (expected finish date), Work order closed date, work order type and more.

In version 15 you have 3 levels of supervision for the completion of the work order:

1. Assigned to
2. Crew Leader
3. Supervisor

This way, staff in these supervisory positions can track all their work easily.

Section 4 The Asset Section

Section 5 The Tasks

Wk in Progress - Work in Progress is used to track steps and stages of the work order. There is a Work in Progress in the header section and on the asset level as well.

Section 4. Assets

MaintStar has two ways to display assets. One way is to show multiple assets in a grid table. This is like the Infrastructure work orders in version 14. The other way is to show one asset on the screen at a time. This display is like the “Standard” work order view from version 14. Each work group setup has a switch to make this selection for the work group.

The screenshot shows the 'WORKGROUP' configuration page. The 'Selected Workgroup' is 'FACIL - FACILITY'. The 'Active' checkbox is checked. The 'Workgroup' is 'FACIL' and the 'Description' is 'FACILITY'. The 'WO Pattern' is 'FO' and the 'Last WO Number' is '23974'. The 'WO Printout' is '147 - Standard Work Order Printout'. The 'Asset Lookup Default' section has 'Standard WO Layout' selected, which is highlighted with a red box. The 'Fleet' checkbox is unchecked. A 'SAVE' button is visible at the bottom left. The left sidebar shows the 'Setup' menu with 'Workgroup' highlighted.

You can use either display method for different workgroups. We would suggest using the Standard Wo Layout for Facilities, Fleet, and Plant operations. The other view is better for Infrastructure groups such as Streets, Storm Water and Sewer. These groups typically work with multiple assets on a single work order and it is helpful to see them in a grid table format.

You add assets with the green Add Asset button. You can add multiple assets to the work order. You will need to save the asset with the save asset button once you have selected it. You move through the different assets with the green left and right arrow buttons. The green button with the three vertical hash marks will show you a table with all assets together. The trash can is used to delete the displayed asset. The blue check box next to the asset ID jumps you to the asset setup screen for the displayed asset.

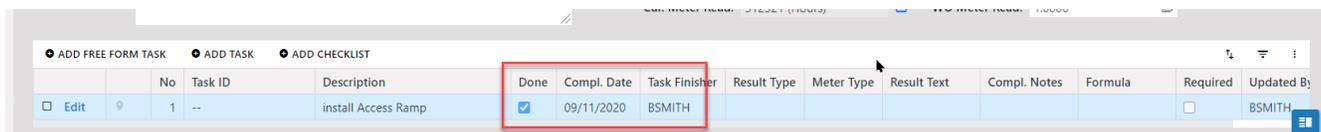
The screenshot shows the 'Asset 1/1' setup page. At the top, there are buttons for 'ADD ASSET', 'SAVE ASSET', and navigation arrows. The 'Asset ID' field is 'House # 35' and is highlighted with a red box. The 'Asset Descr.' is 'House # 35'. The 'Asset Type' is 'House'. The 'Asset Owner' is '030162 - LARSON, I'. The 'Location' is 'Arrow'. The 'WIP' is 'RR - SCHEDULED ON R'. The 'Mgmt Unit' is '000046 - Facility Mx'. The 'Activity' is empty. The 'Subsystem' is empty. The 'Sublocation' is empty. The 'Criticality' is empty. The 'Rating' is empty. The 'UDF Opt1' is empty. The 'Failure Code' is 'MECH - MECHANICAL'. The 'Dntime Hrs' is empty. The 'Comp Date' is empty. The 'UDF Opt2' is empty. The 'Account' is empty. The 'Work Description' is 'Check Fire Extinguishers'. The 'Failure Detail' is empty. The 'Cur. Meter Read.' is 'Asset has no meter' and the 'WO Meter Read.' is empty.

Section 5. The Task Section

MaintStar version 15 has a great new feature. You can add one or more “tasks” to each asset in your asset list.

Tasks are specific actions to be documented for each asset. A task could be very simple such as click on the “Done” checkbox to record that that asset was taken care of.

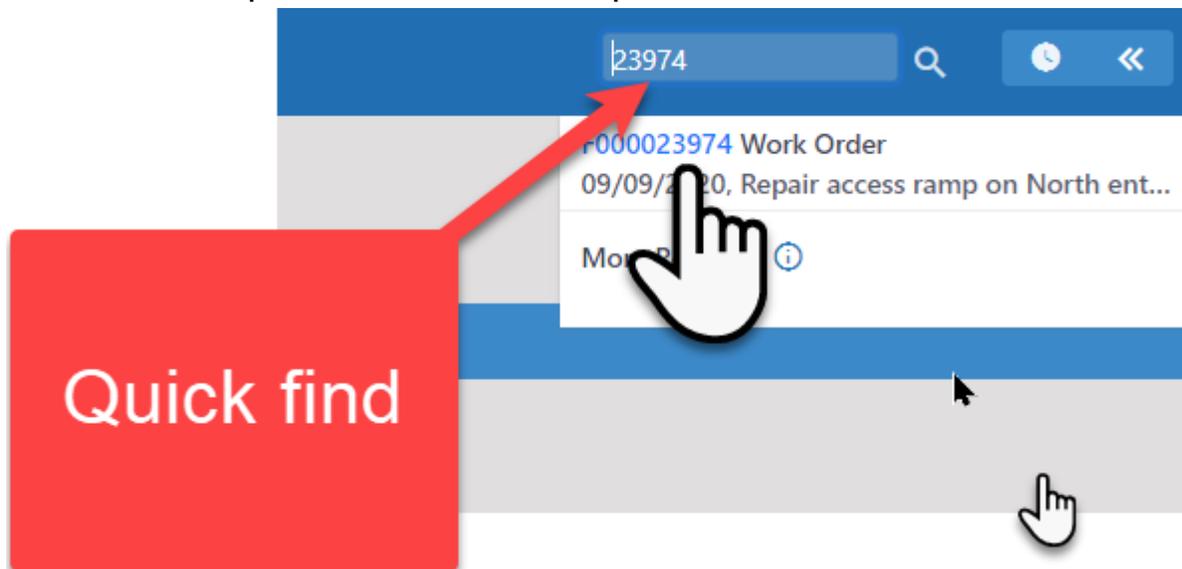
Tasks can be more complex, such as asking for a rating to be recorded for the asset condition, or to update a meter reading. How tasks are set up will be described in the setup document, but for now just be aware that the new feature exists.



ADD FREE FORM TASK ADD TASK ADD CHECKLIST													
	No	Task ID	Description	Done	Compl. Date	Task Finisher	Result Type	Meter Type	Result Text	Compl. Notes	Formula	Required	Updated By
<input type="checkbox"/> Edit	1	--	install Access Ramp	<input checked="" type="checkbox"/>	09/11/2020	BSMITH						<input type="checkbox"/>	BSMITH

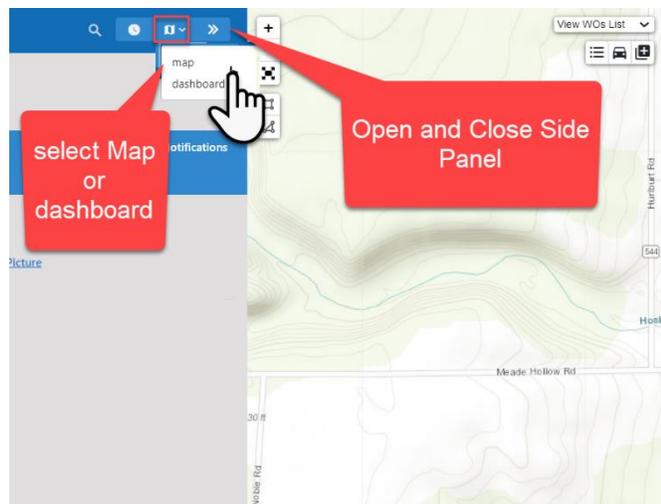
Section 6 The Quick Look Up

In the upper right of the screen you will see a magnifying glass. This magnifying glass will be your new friend. Click on the magnifying glass and a field appears. When you know the number of the work order you are looking for, you can start typing the number in this field. As you type, you will see matching work orders being displayed. Click on the one you are looking for and it will open. NOTE; This takes the place of the F10 lookup from version 14 and earlier.



Section 7 Displaying the Map or Dashboard.

While you are on the Work order, the Side panel is closed. The panel can be set to show either the Map or the dashboard when it is opened. Click the double arrows to open the panel. When the panel is open click the icon with the down arrow. Select map or dashboard. The panel will now show your selection.



Starting a new Work Order

To start a new work order, click the green 'New WO' button.

You will see a confirmation notice in the upper right.

The screenshot displays the MAINTSTAR WORK ORDERS interface. A red box highlights the '+ NEW WO' button in the top left toolbar. A hand cursor is positioned over this button. In the top right corner, a green confirmation message reads 'Workorder Created: F000023974'. A red callout box labeled 'Confirmation' points to this message. The main content area shows the details for Work Order F000023974, including fields for WIP (Waiting In Progress), Assign To, Supervisor, and various asset-related fields.

MAINTSTAR WORK ORDERS

Full Menu: Home (BSMITH)

Work Order

WO Calendar

WO Reports

PM Template

PM Reports

PM Issue WO

Project

Crew

Checklist

Backflow

Mass Deletion

Work Request

Asset

Asset Management

Inventory

Reporting

Work Planning

FACIL

List Filter: Open Work Orders (3)

Work Order F000023974

Details LEM Job Site Request Attachments

+ NEW WO SAVE PRINT CLOSE WO

WO # F00023974

WIP 09/2020

Wk In Progress WL - WAITING FOR LABOR

WO Summary

Assign To

Action Taken

Project No

Supervisor Notes

Wo Type ADA - ADA REPAIRS

Target 09/19/2020

Priority 2 - Medium

Asset 1/1

Asset ID UNKNOWN

Asset Descr UNKNOWN

Asset Type UNKNOWN

WIP

Mgmt Unit 000031 - Utility

Activity

Criticality

Rating

UDF Opt1

Dntime Hrs

Compl Date

UDF Opt2

Confirmation

Workorder Created: F000023974

A new Work Order is created:

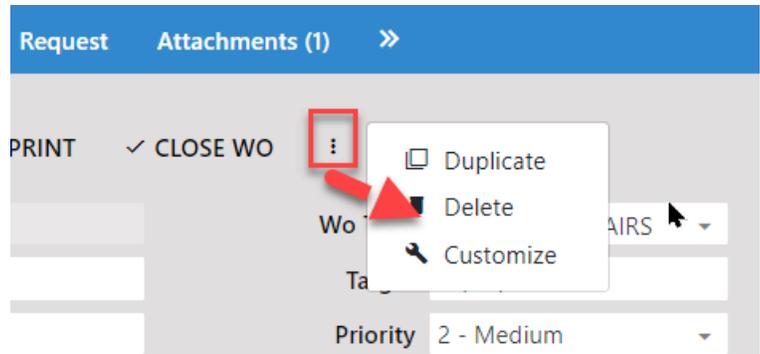
The screenshot shows the 'WORK ORDERS' application interface. The main content area displays the details for Work Order F00023974. The form includes the following fields and values:

- Wo No: F00023974
- Issued: 09/09/2020
- Wo Type: ADA - ADA REPAIRS
- Target: 09/19/2020
- Priority: 2 - Medium
- Wk In Progress: WL - WAITING FOR LABOR
- WO Summary: Repair access ramp on North entrance.
- Assign To: BPRATER - Brandon
- Supervisor: BSTEWART - Brandc
- Action Taken: (empty)
- Project No: (empty)
- Wg Name: FACIL

A red callout box with the text "Drag corner down to" points to the bottom-right corner of the form area, indicating that text fields like 'Wo Summary' can be resized using hash marks.

The work order screen will have many fields on it for you to fill out. The fields that display are customizable in the security section. You can control what fields you want and in which order.

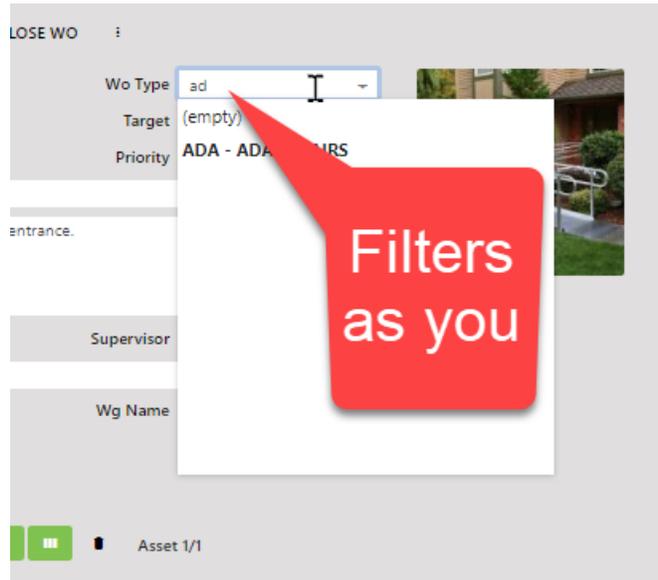
Screen customization is security controlled. If you have rights to customize screens, you will see a customize wrench in the ellipse (3 dots) fly out. We will cover customization in another section in detail.



Note: text fields such as Wo Summary with the three little hash marks in the lower right corner can be dragged to make them bigger using the hash marks as a handle.

Making entries in fields

Fields that have a drop-down arrow on the right will filter as you type in the field. This is a new feature that has been asked for by many users. Just start typing the id or description for the field and MaintStar will display the entries that match what you are typing. When you see what you are looking for click on it to select it.



Deleting entries

If you have an entry in a field but you picked the wrong thing, you can drop down the box and choose something else. The first value in many fields will be the word '(empty)'. This will blank out the field. In tables like the LEM, there is a check box to the left of the line. Check this box and the word delete appears at the top of the table. Click this delete button and the line will be deleted.

Searching in a field

If you can't find what you are looking for with the filter as you type, there is a way to do a more advanced search. The magnifying glass to the right of the field opens a floating window that will let you run a search.

The screenshot shows a software interface with a sidebar on the left containing navigation options like Asset, Inventory, Reporting, and Fleet. The main area displays 'WORK ORDERS' for 'Work Order F000023'. An 'Asset Lookup' dialog box is open, showing a search form and a table of results. The search form includes fields for Asset ID, Asset Subtype, Address, Asset Type, Location, Asset Group, Description, and Sublocation. The table below has the following data:

Asset ID	Asset Type	Asset Description	Subtype	Active	Location	City	Zip	Street	Added By	Date Added
1000	regSEDAN	1997 FORD CONTOUR CH POOL 123		<input checked="" type="checkbox"/>	001	Pleasanton	94566	ADDISON WY	Convert	06/14/2019
1002	regSEDAN	1986 FORD TEMPO		<input checked="" type="checkbox"/>					Convert	06/14/2019
1003	regSEDAN	1994 FORD TEMPO SEDAN		<input checked="" type="checkbox"/>	001				Convert	06/14/2019
1004	regSEDAN	1986 FORD ESCORT SW STATION WAGON		<input checked="" type="checkbox"/>					Convert	06/14/2019
1005	regSEDAN	1998 FORD CONTOUR 4 DR SEDAN		<input checked="" type="checkbox"/>					Convert	06/14/2019
100A	regPU3	2008 FORD HYBRID ESCAPE		<input checked="" type="checkbox"/>					Convert	06/14/2019
101	regUTILITY	2001 FORD F450 UTILITY PICKUP		<input checked="" type="checkbox"/>					Convert	06/14/2019
102	regVACTRUCK	2004 STERLING L7501, VAC-CON		<input checked="" type="checkbox"/>					Convert	06/14/2019
102A	regVACTRUCK	2016 SLUR PRODUCTS MUD DOG		<input checked="" type="checkbox"/>					Convert	06/14/2019
104	regVAN	2002 FORD E150 VAN		<input checked="" type="checkbox"/>					Convert	06/14/2019
104A	regUTILITY	104A		<input checked="" type="checkbox"/>					Convert	06/14/2019
105	regPU3	2003 FORD F250 PICKUP		<input checked="" type="checkbox"/>					Convert	06/14/2019
106	regPU1	2002 FORD F150 1/2 TON, PICKUP		<input checked="" type="checkbox"/>					Convert	06/14/2019
107	regDUMP	1986 FORD F7000 DUMP TRUCK, 3 VARD		<input checked="" type="checkbox"/>					Convert	06/14/2019
108	regVAN	1986 FORD E350 STEPVAN		<input checked="" type="checkbox"/>					Convert	06/14/2019

Type in the fields and the system will filter the results list automatically. Click on the result you are looking for from the display list. You can search with a few letters and MaintStar will instantly display records that match what you have typed. You can search in more than one field in combination.

Adding Assets

The 'Asset Tab' is where assets are added to the work order. The work order starts with the asset "unknown" as a place holder. In most cases, you want the workorder to identify the asset involved so this work becomes part of the asset history. When you have identified the asset you will change the unknown to the correct asset. The magnifying glass to the right of the Asset ID opens a search window for assets.

You can filter by Id, type and other fields. Click on the correct one and then OK to add it to the work order.

The screenshot displays the 'Asset Lookup' window in the MAINTSTAR application. The window contains search filters and a table of assets. A red callout box highlights the table with the instruction 'Click to select, then OK.' The table lists several assets, including House # 10, House # 33, House # 35, and House # 37. The background shows a work order form with fields for Asset ID, Asset Desc, Asset Type, and Asset Owner.

Asset ID	Asset Type	Asset Description	Subtype	Active	Location	City	Zip	Street	Added By	D
House # 10	House	House # 10		<input checked="" type="checkbox"/>	Arrow				ColinP	01
House # 33	House	Moonlight - 3 Bedroom, 2 Bathroom, 2 Car Garage		<input checked="" type="checkbox"/>	Arrow			Homeward Bound Dr	ColinP	06
House # 35	House	House # 35		<input checked="" type="checkbox"/>	Arrow				ColinP	01
House # 37	House	House # 37		<input checked="" type="checkbox"/>	Arrow				ColinP	06

1. To add additional asset, click the add button. A new line will appear.
2. Select asset type, then the asset ID. All other fields are optional.
3. Click save to save your entry.
4. If you click the enter key, you will add an additional line.
5. If you need to delete an entry, check the check box next to the pencil on the left. The delete button will appear. Click the delete button to delete the checked line(s).
6. The pencil on the left will let you edit a line. Click save when you have finished the edit.

New Feature - Tasks

MaintStar version 15 has a great new feature. You can add one or more “tasks” to each asset in your asset list.

Tasks are specific actions to be documented for each asset. A task could be very simple such as click on the “Done” checkbox to record that that asset was taken care of.

Tasks can be more complex, such as asking for a rating to be recorded for the asset condition, or to update a meter reading. How tasks are set up will be described in the setup document, but for now just be aware that the new feature exists.

To add a task just click on one of the asset lines and you will see the task section open below the asset list.

Tasks can be premade or entered free form.

Task Lookup

Task # Description

<input type="checkbox"/>	Task ID ↓	Description	Remarks	Added By	Added Date	Updated By	Updated Date
<input type="checkbox"/>	Check belts			VICTOR	07/10/2020		
<input type="checkbox"/>	HVAC Check Freon	Check/Replace Freon on HVAC		BRETT	06/29/2020		
<input type="checkbox"/>	HVAC Check Valve	Check/ Replace Valve on HVAC		BRETT	06/29/2020		
<input type="checkbox"/>	HVAC Replace Belt	Replace Belt for HVAC unit.		VICTOR	07/09/2020	VICTOR	07/09/2020
<input type="checkbox"/>	ID 2	ID 2		BRETT	06/18/2020		

Check box then

Adding task from premade list.

Asset 1/1

Asset ID UNKNOWN Mgmt Unit 000031 - Utility WIP SCHED - SCHEDULED Dntime Hrs

Asset Descr UNKNOWN Activity Compl Date

Asset Type UNKNOWN Subsystem UDF Opt2

Asset Owner Location Sublocation Account 335-406 - STREET C

Work Description Failure Detail

Cur. Meter Read. 312321 (Hours) WO Meter Read. 1.0000

ADD FREE FORM TASK ADD TASK ADD CHECKLIST

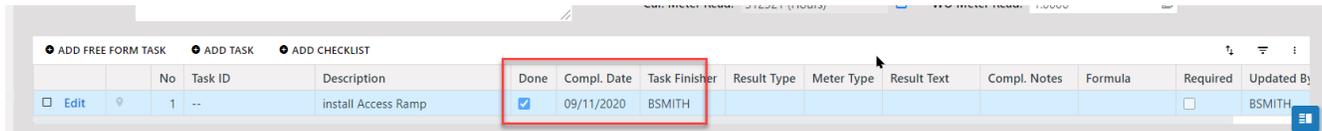
Adding a Free Form Task

Click add free form task.

A new line will be added.

Enter a description. Save.

When the task is complete, edit the task and check the done box. The system will record the date and ID that it was completed.



● ADD FREE FORM TASK			● ADD TASK		● ADD CHECKLIST								
	No	Task ID	Description	Done	Compl. Date	Task Finisher	Result Type	Meter Type	Result Text	Compl. Notes	Formula	Required	Updated By
<input type="checkbox"/> Edit	1	--	install Access Ramp	<input checked="" type="checkbox"/>	09/11/2020	BSMITH						<input type="checkbox"/>	BSMITH

Adding LEM

Labor, Equipment and Material

The tab “LEM”, is a new term in version 15. It stands for Labor, Equipment and Material. This section allows you to put all your cost related data in one screen. We know that you will find this convenient and efficient.

The screenshot shows the MAINTAR WORK ORDERS interface. The 'ADD LEM' button is highlighted with a red circle and the number 1. A dropdown menu is open, showing various entry types, with 'Labor' selected and highlighted with a red circle and the number 2. The dropdown menu items include: (empty), ACASTILLO - Alexander Casti, ADELEON - Angelica DeLeon, BGABBANI - Brett Gabbani, BJACOBS - Benjamin Jacobs, BPRATER - Brandon Prater, BRETT - Brett Kolve, brett3 - brett 3, BSMITH - Blaine Smith, BSTEWARD - Brandon Stewart, and CBOULWARE - Cory Boulware. The table below the dropdown has columns: No, Type, Code/ID, Description, PayType / Class, QTY, UOM, Unit Cost, Total Cost, Date, Mgmt Unit, Activity, Location, Sub Loc., and Account No. The 'ADD LEM' button is also highlighted with a red circle and the number 4. The 'Date' field is highlighted with a red circle and the number 5.

1. Start a new entry with the add LEM button.

2. Select type of entry.

You can enter:

- Labor - a person
- Equipment - Vehicles or other equipment used
- Material - parts and materials from your inventory
- Miscellaneous costs
- Work Quantity (If you are using Work Planning)
- Crews of people and equipment (Must be created in Setup)
- Parts Kit (Must be created in Inventory)

3. After you make the type selection, select code identity for the person or contractor or crew or part etc.
4. At the Right on each line there are optional fields for Location code Management Unit and Activity.

NOTE: Management unit (previously called Administrative System) and Activity are now on each LEM line. This means you can have **MULTIPLE** activities in the same work order. Set the mgt unit and activity on one line of the LEM, and it will repeat on lines you enter after that. This is a real time saver.

If your workgroup is using the standard work order layout, then each asset has its own LEM group. This is the way the Regular work order was arranged in version 14. The infrastructure work order layout has one LEM section for the entire work order. This is the way the infrastructure work orders were arranged in version 14.

The Asset History Tab

The asset history tab will list the assets in this work order.

If you click on the asset type field for one asset, you will see the list of work orders that have that asset appear below the asset list.

If you click on the asset ID (This is Blue and is a link) you will open up the asset setup screen for this asset.

The screenshot displays the MAINTAR WORK ORDERS interface. The top navigation bar shows 'MAINTAR WORK ORDERS' and a search icon. Below the navigation bar, the 'Assets History' tab is selected for Work Order F000023974. The interface is divided into a sidebar and a main content area.

Sidebar (Left):

- Work Order
- WO Calendar
- WO Reports
- PM Template
- PM Reports
- PM Icon WO
- Project
- Crew
- Checklist
- Backflow
- Menu Deletion
- Work Request
- Asset
- Asset Management
- Inventory
- Reporting
- Work Planning
- Purchase Orders
- Invoicing
- Fleet
- Setup
- Security

Main Content Area:

Assets Table:

Asset ID	Asset Type	Link to WO	Account No	Compl. Date	Priority	Notes
Village Hall	Building	WO Search	225-406			Village Hall, Built in 2016.

Work Orders for Asset: Building Village Hall

WO #	Issued	Target	Closed	Compl. Date	Status	WO Cost	WO Descr	Supervisor	Location	Failure Code	Rating	Remarks	Act Labor Hrs
F000023974	09/09/2020	09/19/2020	09/09/2020		O	0.00	Repair access ramp on North entrance 123	STEWART					
F000023788	08/14/2020	08/04/2020			O	0.00	Clean the graffiti						
F000023785	08/14/2020	08/04/2020			O	0.00	Clean graffiti off wall	ADELSON					
STR0000569	07/08/2020	07/13/2020			O	0.00	Gingerbread Freshchool-Banner printed https://www.jp10p.com/				4.00		
WR00000119	06/25/2020	06/25/2020			O	0.00							
						\$0.00							

Job Site

The Job site tab is where you can record a physical address for the work. This is optional as some types of work can be referenced by the location code on the header tab. If you are however working at a physical street address you can store it here.

The address line will pull in addresses from the address table from the setup. It will filter entries as you type.

The screenshot shows the MAINTSTAR WORK ORDERS interface. The top navigation bar includes the MAINTSTAR logo and the title WORK ORDERS. Below this, there is a filter for 'Open Work Orders (3)*' and a breadcrumb for 'Home (BSMITH)'. The main content area is titled 'Work Order F00023974' and features a 'SAVE' button. The 'Job Site' tab is active, displaying a form with the following fields:

Site Addr Key	3	Site Street Name	ADDISON WY - ADI
Site Street Number	432	Site State	CA
Site City	Pleasanton	Site Cross Street	
Site Zip Code	94566	Latitude	
Site Loc Desc		Longitude	
Map Markup			

The left sidebar contains a navigation menu with the following items: Work Order, WO Calendar, WO Reports, PM Template, PM Reports, PM Issue WO, Project, Crew, Checklist, Backflow, Mass Deletion, Work Request, Asset, Asset Management, Inventory, Reporting, Work Planning, and Purchase Orders.

Request

If the work order originated from a request made with the MaintStar Work Request, the information from the request will be stored here.

If the work order did not originate from a request, you are free to record information about the main contact or informal request here.

The screenshot displays the MaintStar Work Orders interface. The top navigation bar includes the MaintStar logo and the title 'WORK ORDERS'. Below this, a breadcrumb trail shows 'Home (BSMITH)' and 'Work Order'. The main content area is titled 'Work Order F000023974' and features a tabbed interface with the following tabs: Details, LEM, Assets History, Job Site, Request (highlighted with a red box), Plan, Issue/Action, Status, Related, and Attachments (1). A green 'SAVE' button is located at the top left of the form area. The form is titled 'Work Request:' and contains the following fields:

Req Text	Please Repair Ramp		
Req Request			
Req Comments			
Req Notes			
Customer Type	Public	Customer Id	HUDSON, BOB - H
Customer Name	HUDSON, BOB	Req Cell Phone	9259315650
Req Phone2	1	Req Email	
Req Addr Key			
Req Street Number		Req Street Name	FIRST & BERNAL
Req Cross Street		Req City	PLEASANTON
Req State	CA	Req Zip	
Req Department		Req Date	

The left sidebar contains a 'Full Menu' with the following items: Home (BSMITH), Work Order (selected), Work Order, WO Calendar, WO Reports, PM Template, PM Reports, PM Issue WO, Project, Crew, Checklist, Backflow, Mass Deletion, Work Request, Asset, Asset Management, Inventory, Reporting, Work Planning, and Purchase Orders.

Related

The related tab allows you to link in other work orders that have some relationship to this work order. All the linked work orders will show the related work orders on this tab.

To make a linkage, click the add button and then select the related work order.

You can click the blue work order numbers to jump to each work order.

The screenshot shows the MAINTSTAR WORK ORDERS interface. The main content area displays the 'Related' tab for Work Order F000023974. A table lists related work orders with columns for No, Rel Type, #, Status, WO Type, Priority, Approved By, Planned By, Issued, Target, and Closed. The table contains two rows of related work orders.

● ADD RELATED												
<input type="checkbox"/>	Edit	No	Rel Type	#	Status	WO Type	Priority	Approved By	Planned By	Issued	Target	Closed
<input type="checkbox"/>	Edit	1	WO	F000023968	O	ADA	2			09/09/2020	09/19/2020	09/09/2020
<input type="checkbox"/>	Edit	2	WR	WR20000065	O	ADA	2			09/09/2020	09/19/2020	09/09/2020

Notifications

The notification tab allows you to add several different types of notifications to the work order for different individuals. Notifications can be email notices or SMS text messages. These notifications would be over and above other notifications that are set up for normal processing

The screenshot displays the MAINTSTAR WORK ORDERS interface. The top navigation bar includes the MAINTSTAR logo, the title 'WORK ORDERS', a search icon, and a back arrow. Below the navigation bar, there is a 'Full Menu' section with a 'Home (BSMITH)' link. The main content area is titled 'Work Order 0000021266' and features a horizontal menu with options: Details, LEM, Assets History, Job Site, Request, Plan, Issue/Action, Status, Related, Attachments (2), Log, and Notifications. The 'Notifications' tab is currently selected, showing an 'ADD USER' configuration table.

ADD USER								
	Username	When WO is Created	When Assigned	When WIP Changes	When Part is Received	When WO is Closed	When Task is Done	When E
<input type="checkbox"/> Edit	BIACOBS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The table shows a single user entry for 'BIACOBS' with checkboxes for various notification events. The 'When WO is Created', 'When WIP Changes', and 'When Part is Received' events are currently checked.

Plan

This tab Holds several different elements.

- You can record a percentage of completion
- Record reasons the work order was not completed
- Record reason for downtime
- The bottom section lets you record “Planned” dates and costs in order to compare to the “Actual” dates and costs.

The screenshot displays the MAINTSTAR WORK ORDERS application interface. The main content area is divided into several sections:

- Completion %:** A text input field for recording the percentage of completion.
- Reason For NonCompletion:** A form with checkboxes for various reasons:
 - Lack of Expertise
 - Lack of Time
 - Lack of Man Power
 - Lack of Proper Tools
 - Lack of Information
 - Lack of Parts, Materials
- Comment:** A text area for adding notes.
- Downtime Reasons:** A section for recording reasons for downtime.
- Table:** A table comparing planned and actual costs and dates.

	Plan	Actual	Variance	
Start		07/08/2020	0	day
Finish		07/08/2020	0	day
Work Qty		0	0.00	
Labor HR		0.00	0.00	hour
Labor	\$.00	\$0.00	\$0.00	
Equipment	\$.00	\$0.00	\$0.00	
Material	\$.00	\$0.00	\$0.00	
Misc.	\$.00	\$0.00	\$0.00	
Contractor	\$.00	\$0.00	\$0.00	
Totals	\$0.00	\$0.00	\$0.00	

Log

The log is a list of all inserts, deletions and updates made to the Work Order. These events are recorded by date and record what user made them.

Date	User	Key#	SQL
07/04/2020	ColinP	0000021266	insert into wo_hdr(rec_type='W',origin_code='D',vg_name='FACU',orig_flag='CM',status='O',debug='0',wo_no='0000021266',est_labor='0',est equip='0',est_part='0',est_unit='0',est_total='0',issued='2020-07-04 21:13:42.557',target='2020071
07/04/2020	ColinP	0000021266	insert into wo_asset(wo_no='0000021266',seq_no='2',asset_type='UNKNOWN',asset_id='UNKNOWN',asset_no='2',acct_no=null)
07/04/2020	ColinP	0000021266	delete from wo_asset where wo_no=0000021266 and asset_no=2
07/04/2020	ColinP	0000021266	insert into wo_task(asset_no='1',wo_no='0000021266',task_id='Alarm',task_desc='Test all fire detectors',seq_no='1',task_no='1',done='0',result_type='1',meter_type='1')
07/04/2020	ColinP	0000021266	update wo_hdr(wo_hdr.status='O',attach_seq_id=null,billable='N',mgmt_unit='1',activity_code=null,wo_no='0000021266',wo_type='CM',vg_name='FACU',issued='2020-07-04 21:13:42.557',target='2020-07-13 12:00:00.000',closed=null,assign_to='ColinP',wo_desc=null,priority='NE',applyby=null,supervisor=null,crew_leader=null,action_taken=null,sus_notes=null,acct_no=null,project_no=null,wk_in_progress=null,tmr_no=null,soh_no=null,rec_type='W',origin_code='D
07/04/2020	ColinP	0000021266	update wo_asset(wo_no='0000021266',asset_no='1',asset_type='House',asset_id='House # 33',seq_no='1',asset_desc='UNKNOWN',subseq_id='Fire',loc_cd='Arrow',acct_no=null,failure_code='',cost_share='100.00',remarks=null,priority=null,rating=null,comp
07/05/2020	ColinP	0000021266	update wo_hdr(wo_hdr.status='O',attach_seq_id=null,billable='N',mgmt_unit='1',activity_code=null,wo_no='0000021266',wo_type='CM',vg_name='FACU',issued='2020-07-04 21:13:42.557',target='2020-07-13 12:00:00.000',closed=null,assign_to='ColinP',wo_desc=null,priority='SPM',applyby=null,supervisor=null,crew_leader=null,action_taken=null,sus_notes=null,acct_no=null,project_no=null,wk_in_progress=null,tmr_no=null,soh_no=null,rec_type='W',origin_code='D
07/06/2020	VICTOR	0000021266	update wo_hdr(wo_hdr.status='O',attach_seq_id='523',billable='N',mgmt_unit='1',activity_code=null,wo_no='0000021266',wo_type='CM',vg_name='FACU',issued='2020-07-04 21:13:42.557',target='2020-07-13 12:00:00.000',closed=null,assign_to='ColinP',wo_desc=null,priority='SPM',applyby=null,supervisor=null,crew_leader=null,action_taken=null,sus_notes=null,acct_no=null,project_no=null,wk_in_progress=null,tmr_no=null,soh_no=null,rec_type='W',origin_code='D
07/07/2020	ColinP	0000021266	update wo_hdr(wo_hdr.status='O',attach_seq_id='523',billable='N',mgmt_unit='1',activity_code=null,wo_no='0000021266',wo_type='CM',vg_name='FACU',issued='2020-07-04 21:13:42.557',target='2020-07-13 12:00:00.000',closed=null,assign_to='ColinP',wo_desc=null,priority='SPM',applyby=null,supervisor=null,crew_leader=null,action_taken=null,sus_notes=null,acct_no=null,project_no=null,wk_in_progress=null,tmr_no=null,soh_no=null,rec_type='W',origin_code='D',standby null,wd_start null,wd_end null,wd
07/07/2020	ColinP	0000021266	insert into wo_len(valid_item='1',wo_no='1',seq_no='999999',app_no='000241127',mgmt_unit='00031',activity_code='1',loc_cd='Arrow',subseq_id=null,total_cost='0',r_type='labor',r_code='ColinP',wo_no='0000021266',acct_no='5',desc='Colin Patchet
08/04/2020	ColinP	0000021266	update wo_hdr(wo_hdr.status='O',attach_seq_id='523',billable='N',mgmt_unit='1',activity_code=null,wo_no='0000021266',wo_type='CM',vg_name='FACU',issued='2020-07-04 21:13:42.557',target='2020-07-13 12:00:00.000',closed=null,assign_to='ColinP',wo_desc=null,priority='SPM',applyby=null,supervisor=null,crew_leader=null,action_taken=null,sus_notes=null,acct_no=null,project_no=null,wk_in_progress='APPR',tmr_no=null,soh_no=null,rec_type='W',origin_code='D',standby null,wd_start null,wd_end null,wd
09/09/2020	ESMTH	0000021266	update wo_hdr(wo_hdr.status='O',attach_seq_id='523',billable='N',mgmt_unit='1',activity_code=null,wo_no='0000021266',wo_type='CM',vg_name='FACU',issued='2020-07-04 21:13:42.557',target='2020-07-13 12:00:00.000',closed=null,assign_to='ColinP',wo_desc=null,priority='SPM',applyby=null,supervisor='BACDBS',crew_leader=null,action_taken=null,sus_notes=null,acct_no=null,project_no=null,wk_in_progress='APPR',tmr_no=null,soh_no=null,rec_type='W',origin_code='D',standby null,wd_start null,wd_end null,wd
09/11/2020	ESMTH	0000021266	insert into wo_notify(user_name='BACDBS',on_creation='1',on_assigned='0',on_wb_change='1',on_parts_rev'd='1',on_close='0',on_task_done='0',on_err1='0',on_err2='0',on_err3='0',wo_no='0000021266')

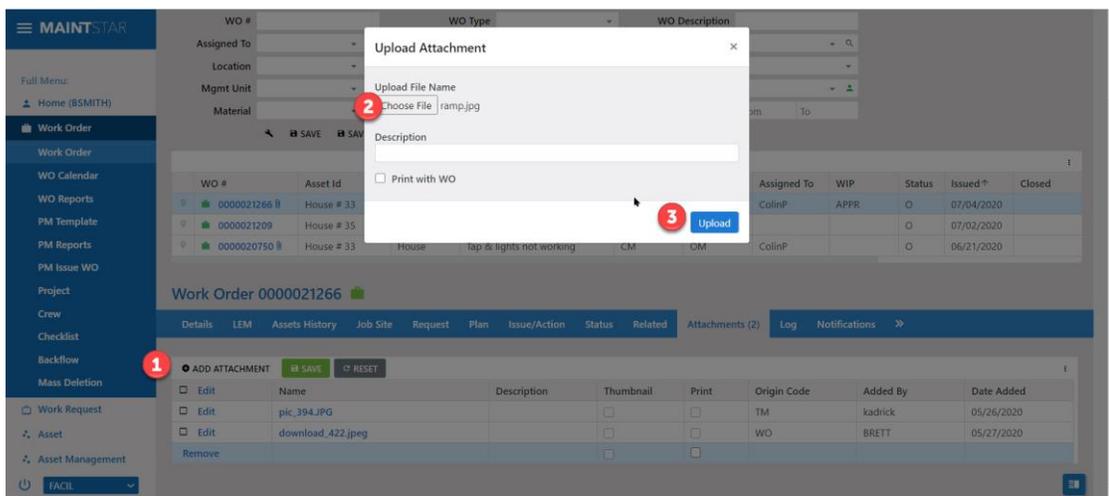
Attachments

The Attachment tab lets you attach pictures, PDF and other types of files to the workorder.

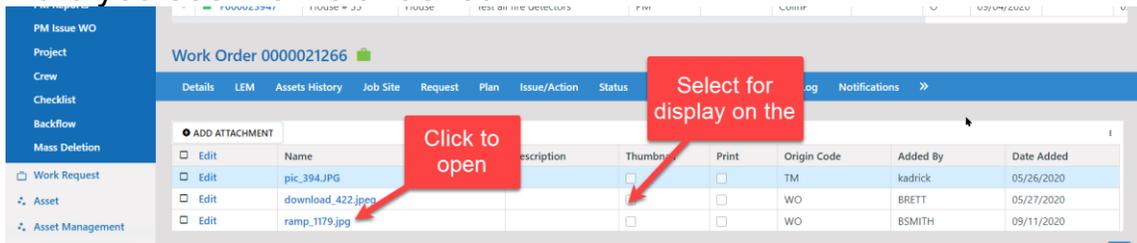
To add an attachment, click the add button.

In the pop-up window, click choose file and navigate to the file you want to attach. You can attach any type of file. MaintStar will use your windows file association for the program to open different file types. You can have any number of attachments

The thumbnail box selects the image for display on the details tab.



Here you see the file attached:



When you click on the attachment in any part of the line other than the name link, it will display on the screen. If you click on the name link the file will open in another window.

The screenshot displays the MAINTSTAR WORK ORDERS interface. The main content area shows a work order for 'Work Order 0000021266'. Below the work order details, there is an 'ADD ATTACHMENT' section with a table of attachments:

<input type="checkbox"/>	Edit	Name	Description
<input type="checkbox"/>	Cancel	pic_394.JPG	
<input type="checkbox"/>	Edit	download_429.jpeg	
<input type="checkbox"/>	Edit	ramp_1179.jpg	

A red dashed arrow points from the 'ramp_1179.jpg' attachment name to a preview window on the right. The preview window shows a photograph of a ramp with metal railings. Another red dashed arrow points from the 'pic_394.JPG' attachment name to a smaller thumbnail image of the same ramp located below the attachment table. The interface also includes a sidebar with navigation options like 'Work Order', 'WO Calendar', and 'WO Reports', and a top navigation bar with 'MAINTSTAR' and 'WORK ORDERS'.

Issues and Actions

The 'Issues and Actions' section is used to record specific issues that need service or maintenance, and the action steps used to complete or resolve the issue. This section is optional. It would be used if you want a very detailed record of issues and solutions. Many of our users will find the Task function previously described will be enough detail.

The screenshot displays the MAINTAR WORK ORDERS interface. The top navigation bar includes 'MAINTAR' and 'WORK ORDERS'. Below this, a breadcrumb trail shows 'Home (BSMITH)' and 'Work Order 0000021266'. The main content area is divided into two sections: 'ISSUES' and 'Actions'.

ISSUES

Seq. No.	Issue	Description	Comment	Updated By	Date Updated
1	PRIVATE SSO	SANITARY SEWER OVERFLOW RESULTING FROM PRIVATE PIGS			

Actions

Seq. No.	Action	Description	Status	Comment	Updated By	Date Updated
	FLUSHED LINE	FLUSHED LINE				

The interface also features a left-hand navigation menu with options such as 'Work Order', 'WO Calendar', 'WO Reports', 'PM Template', 'PM Reports', 'PM Issue WO', 'Project', 'Crew', 'Checklist', 'Backflow', 'Mass Deletion', 'Work Request', 'Asset', 'Asset Management', 'Inventory', 'Reporting', 'Work Planning', 'Purchase Orders', 'Invoicing', 'Fleet', 'Setup', and 'Security'. At the bottom left, there is a 'FACIL' dropdown menu.

PM Scheduling

PM (Preventative Maintenance) scheduling in version 15 adds many new features and options. In version 14 and earlier, MaintStar had two separate ways to schedule PMs.

1. MaintStar Had a Calendar based Pm that used a ‘Master Schedule’ to hold future pm work orders. This method was typically used by Facilities and Plant operations.
2. Meter based work orders and Infrastructure groups used a different method that calculates PMs on the fly and did not have a master schedule.

Both processes had their own advantages and limitations. Neither process was a perfect solution.

In Version 15, the Pm scheduling process has been completely redesigned from the ground up to be more flexible and offer more options than ever.

The new system is unified. You do not have different setup process and different groups of PMs to issue that you had in version 14. In fact, you can set the system to automatically issue the PMs automatically.

NOTE: PMs that are imported from version 14 will all fit in the version 15 structure.

The PM setup is in the Work Order menu section.

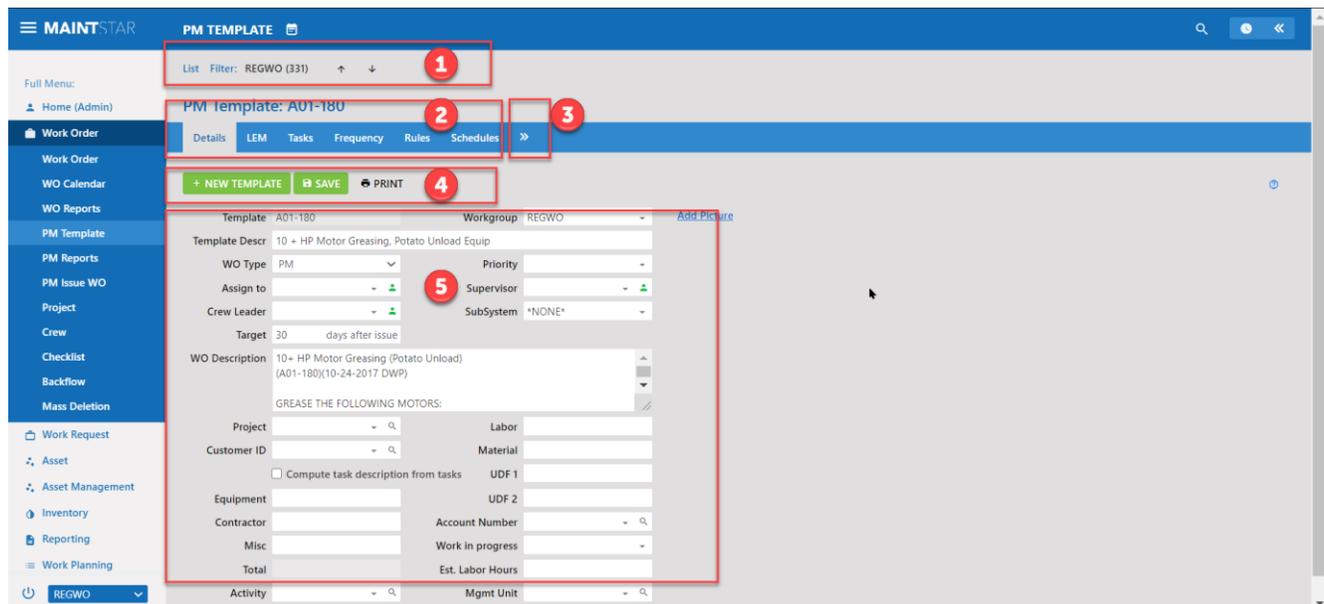
The screenshot displays the MAINTSTAR WORK ORDERS interface. On the left, a navigation menu is expanded to show the 'Work Order' section, which includes sub-items: Work Order, WO Calendar, WO Reports, PM Template, PM Reports, and PM Issue WO. A red callout box labeled 'PM Menu Section' points to the PM-related items. The main content area shows details for Work Order 0000126505, including a summary and assigned crew.

WO Summary	NOTTINGHAM
MANY LIGHTS OUT	
REPLACED BULBS, BALLA	
Assigned To	
Action Taken	
Workgroup	REGWO
Mgmt Unit	
Supervisor Notes	

Templates

Pm creation begins with “templates” The Template is used to build Pm Schedules. Templates hold the task, frequency Scheduling rules and other information about a pm service. A template combined with assets are the raw materials needed to create a pm schedule.

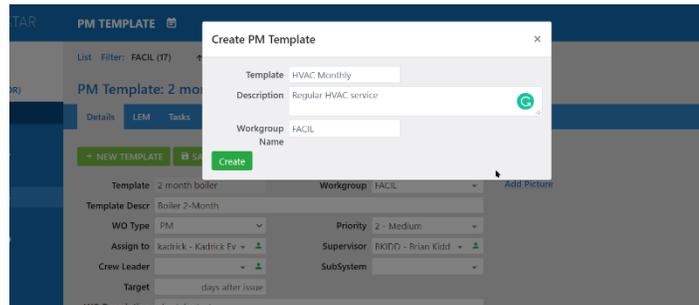
Here is a Template Screen:



1. **Search and Filter** -opens and closes with the word ‘List’. Works the same as on the work order screen. This is used for finding templates that you have already made.
2. **Main Tabs of the Template sections**
 - a. **Details** - is the main template screen
 - b. **LEM** - section allows you to add labor, equipment and materials to the template, where they will be added to the workorders that result from the use of this template.
 - c. **Tasks** - Tasks can be added to the template here. Note: Tasks are a new function and adding multiple tasks may be a better than making a list of tasks in WO description text box.
 - d. **Frequency** - This key part of the template is where frequency is set up. Frequencies can be Calendar or Meter based or both.
 - e. **Rules** - This section controls how and when the Pm will be issued.
 - f. **Schedules** - This important section controls the generation of the PMs, shows forecast and sets notification rules.

Create a new template

In the Template menu, under Work Order click ‘New Template’
A pop-up will appear. Type in a name for the template, and a description. You will see the name of the work group you are currently in as a reminder.



Click Create to save. The system will pop up a confirmation.

Fill in the various fields as you want the work order to have by default. These values will be prepopulated. If you leave a field blank, you can fill it in on the work order itself after it is issued.

You can create the instructions for the service two different ways. You can type in a list of steps to be performed in the large ‘WO Description’ box. This is how MaintStar version 14 was configured. New in version 15, you can create the task list with the task function. There is a check box below the ‘WO Description’ to activate this process. We will use this method in this example to show how it functions. Click Save.

Template	HVAC Monthly	Workgroup	FACIL	Add Picture
Template Descr	Regular HVAC service			
WO Type	PM	Priority	2 - Medium	
Assign to	BKIDD - Brian Kidd	Supervisor	BRETT - Brett Kolve	
Crew Leader	ACASTILLO - Alexar	SubSystem		
Target	5 days after issue			
WO Description				
Project		Labor	.00	
Customer ID		Material	.00	
Equipment	.00	UDF 1		
Contractor	.00	UDF 2		
Misc	.00	Account Number		
Total		Work in progress	SCHED - SCHEDULED	
Activity	0001 - General Serv	Est. Labor Hours		
		Mgmt Unit	000031 - Utility	

Compute task description from tasks

Setting Frequency

The frequency tab is where you set the rate of occurrence for the PM. This is referred to as when the Pm will be “Due”

List Filter: FACIL (18) ↑ ↓

PM Template: HVAC Monthly

Details LEM Tasks Notifications Attachments **Frequency** Nesting Rules Asset Types Schedules >>

Calendar

SAVE RESET

	Frequency	Unit	On
<input type="checkbox"/> Cancel	1	Months	1st Mon

Meter

SAVE RESET

	Frequency	Meter Type
Remove	300	Miles

Calendar

The **Calendar** section sets occurrence of the pm on a frequency of days, weeks months and years. Type in the number and select the unit such as 3 - month, 1 - year. When you do this the **ON** Field will become active. The “ON” field lets you set a specific day, or first Monday or last Friday etc. for Month unit. For weeks, you can select which day of the week. Days and years do not have an ‘On’ choice. They will be calculated based on your start date, which is set later in this example. The calendar is the primary scheduling frequency for most PMs. We suggest you use it in all cases. It is reliable and repeatable.

Meter

If you have equipment that is metered such as vehicles, production equipment etc., you can include a meter in the PM frequency. You must first have the intended vehicle or equipment set up with a meter, and you must have a process in place for the meter reading to be taken and recorded regularly. You may have the asset meter updated automatically if you have the system linked to a vehicle fueling system which records updated meter values at fueling, or a Scada system for production equipment which captures meter values.

If your intended assets for this template have a meter you can set the meter frequency here. Select the meter type from the drop down. Meter types are set up in the setup module Setup>tables>meter type.

Event

Reserved for future development.

Rules Tab

The frequency tab sets the basics for frequency interval of the PM. The rules tab allows you to make sophisticated modifications to the frequency schedule.

The Fixed / Floating Radio buttons control how the pms from this template will issue.

Fixed - PMs will remain fixed on their original schedule pattern. From issue date to issue date. For example, If you start a PM for the first Monday of every month, on a fixed schedule, It will be due the first Monday of every month consistently.

We recommend you use the fixed schedule in most cases/

The Floating schedule - This calculates the next due from the last **CLOSED** date of the service to the next issue date. This means if you opened a monthly service on the first and closed it on the 20th of the month, the next service would calculate the month frequency from the **Closed date of the 20th** to the next issue date of the 20th of the next month. This would be useful for services that are not critical. The system will calculate based on your ability to close out the PMS.

This means that you may not accomplish 12 monthly services over the course of a year.

Below the fixed and floating radio buttons are two dropdowns that will reschedule PMs which would happen to fall on a Saturday or Sunday. You can 'Pull' the pm back, up to a week or 'push' them ahead.

The Section Labeled "Don't create this PM between" Lets you set a date range in which no PMs will be generated.

The checkbox at the bottom of the screen is very important to understand.

When the check box is unchecked, the system will wait for one PM service to be completed before the next one will be generated.

If you check the box, the next service will be generated according to the schedule even if the current PM is still Open.

Note: If you only want one open pm for a service to be open at a TIME, LEAVE THE BOX UNCHECKED.

On the right, the create work order checkbox should be checked. The Alerts are for future development.

The Template LEM Tab

On the LEM Tab it is possible to add Labor, Equipment and materials to the template. These entries will be brought to the work order automatically when the work order is issued.

The screenshot shows the MAINTSTAR PM TEMPLATE interface. The left sidebar contains navigation options: Work Order, Work Order, WO Calendar, WO Reports, PM Template (selected), PM Reports, PM Issue WO, Project, Crew, Checklist, Backflow, Mass Deletion, Work Request, Asset, Asset Management, Inventory, and FACIL. The main area displays the PM Template: HVAC Monthly. The LEM tab is active, showing a table with columns: Edit, No, Type, Code/ID, Description, QTY, UOM, Unit Cost, Total Cost, Mgmt Unit, Activity, Location, Account No., and Remarks. The table contains four entries:

Edit	No	Type	Code/ID	Description	QTY	UOM	Unit Cost	Total Cost	Mgmt Unit	Activity	Location	Account No.	Remarks
Remove	1	Labor	BIACO	Benjamin Jacobs		HR		0.00	00003 - F				
Remove	1	Labor	BSMITI	Blaine Smith		HR	55.50	0.00	00003 - F				
Remove	1	Labor	JTAGAI	Jennifer Tagalog		HR		0.00	00003 - F				
Remove	1	Equipment	truck 0	truck 01		HR	.00	0.00	00003 - F				

Total: 0.00

You add entries here in the same way they are added to a work order.

Add New - creates a single-entry line.

Add crew - allows pre-made crews to be added as a group.

Add Kit - allows pre-made groups of inventory materials.

Tasks Tab

The tasks tab allows you to add tasks to the work order. The 'add task button lets you select a task that has been created and saved from the setup section Tables>Task Id.

The 'add row' allows you to add a task on the fly.

Tasks will allow the user to mark a checkbox when the task is done. The system will stamp the completed time and date automatically.

The screenshot shows the MAINTSTAR PM Template interface. The main content area displays a table with columns for 'ADD ROW', 'ADD TASK', and 'ADD CHECKLIST'. The table contains four rows of tasks:

ADD ROW	ADD TASK	ADD CHECKLIST	Task ID	Task Description	Meter Type	Result Type	Required	Nesting
<input type="checkbox"/> Edit	1		HVAC Check Belts	Check/Replace Belts on HVAC			N	N1
<input type="checkbox"/> Edit	2		HVAC Check Freon	Check/Replace Freon on HVAC			N	N1
<input type="checkbox"/> Edit	3		HVAC Check Valve	Check/ Replace Valve on HVAC			N	N1
<input type="checkbox"/> Edit	4		HVAC Replace Bearing	HVAC Replace Bearing			N	N1

New in version 15, you can create the Work Order description from the template, with the task function. There is a check box below the 'WO Description' to activate this process. We will use this method in this example to show how it functions.

The screenshot shows the MAINTSTAR Work Order form. The 'WO Description' field is empty. Below the 'WO Description' field, there is a checkbox labeled 'Compute task description from tasks' which is checked. The form also includes various other fields such as Template, Workgroup, Priority, Assign to, Supervisor, Crew Leader, SubSystem, Target, Project, Labor, Customer ID, Material, Equipment, Contractor, Account Number, Work in progress, Est. Labor Hours, Activity, and Mgmt Unit.

Adding Tasks

On the task tab, you can add free entry tasks (created on the fly) with the “add Row”

The “Add Task” will let you select from a list of pre-built tasks.

The screenshot shows the MAINTAR PM TEMPLATE interface. The main content area displays a table of tasks for 'PM Template: HVAC Monthly'. The table has columns for 'Seq No', 'Task ID', 'Task Description', 'Meter Type', 'Result Type', 'Required', and 'Nesting'. There are four rows of tasks listed.

Seq No	Task ID	Task Description	Meter Type	Result Type	Required	Nesting
1	HVAC Check Belts	Check/Replace Belts on HVAC			N	N1
2	HVAC Check Freon	Check/Replace Freon on HVAC			N	N1
3	HVAC Check Valve	Check/ Replace Valve on HVAC			N	N1
4	HVAC Replace Bearing	HVAC Replace Bearing			N	N1

Note the “Nesting” will be marked as N1 automatically. Nesting will be described separately in this document. N1 (meaning Nesting group1) designates a Pm that has one service cycle that repeats.

“Add Checklist” allows you to add in lists of several tasks saved together in a list. The checklists are created and saved in the Work Order menu section “Checklist”

The ‘Required’ check box, means that this task must be marked “done” for the work order to be closed.

Nesting

The Concept of Nesting is very simple.

Example 1

For some assets you have only one PM service, let's say you do this once a month. Every month you do the same service over and over. That is a single repeated service.

Example 2

For other assets they require different levels of service. Let's say you do tasks one and two every month. Then every 6 months you do something more, task one, two and three. Then once a year you do something more, task one, two three and four.

Example 2 would have a different PM template for each of the three levels of service, the monthly, the 6 months and the yearly. If this was built with 3 templates, each would produce PMs at their given frequency. When the monthly and 6 months PMS would be due on the same month, you would have 2 PMs. Likewise, when the yearly, 6 month and monthly fall due together you would have 3 Pm work orders created in one month.

Can you see the problem here? You don't typically want multiple PM work orders for the same assets at the same time.

Nesting is a way to solve this problem by giving you only ONE PM service per period. The shortest frequency determines service period so this example nested would look like this:

Service period	Pm service
1	monthly
2	monthly
3	monthly
4	monthly
5	monthly
6	6 month
7	monthly
8	monthly
9	monthly
10	monthly
11	monthly
12	yearly

MaintStar version 15 there are two different ways to accomplish this with nested services.

The first way is to have separate templates for the monthly, 6 month and yearly services. Each written with different instructions. MaintStar will switch out the templates according to the service period. This is the way MaintStar version 14 and earlier worked. If you had templates set up this way, MaintStar 15 will be able to import them and the services will continue just as you had before.

The new way in version 15 is to have only one template but use the new feature of tasks. You can trigger which tasks should be shown on different nested schedule frequencies. Both methods accomplish the same result.

We suggest, if you are an existing customer with imported templates from previous versions you can continue using those as they are. When you however, add in new PMs, try using tasks for the different nested frequencies. Ultimately, we feel this is a more flexible approach.

Nesting based on using different templates.

(Version 14 style)

Here you see a monthly template with nesting configured to switch in a 6-month template when the monthly occurs 6 times (6 months), and to switch to template named Hydrant yearly when the base monthly occurs 12 times (once a year). This is the way MaintStar version 14 and earlier handled nesting.

The screenshot displays the 'PM Template: HVAC Monthly' configuration in the software. It shows a list of templates and a detailed view of the nesting configuration.

Template Id	No of Sch.	Workgroup	TM Description	WO Description
Gen 3 HVAC PM	0	FLEET	Script #3 of Scenario 9	
HVAC B	5	FACIL	PM HVAC unit	PM HVAC. Check for debris, clean areas, test temperature.
HVAC 30 Day	1	FACIL		
HVAC Monthly	1	FACIL	Regular HVAC service	
HVAC No.4	1	FACIL	Every 30 days and every 90 days	

ADD	Nesting	Nest Description	Multiplier	Based On	Exclusive	Use Template
<input type="checkbox"/> Edit	N1	monthly	1	Frequency	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Edit	N2	6 month	6	N1	<input checked="" type="checkbox"/>	Hydrant 6 Month
<input type="checkbox"/> Edit	N3	yearly	12	N1	<input checked="" type="checkbox"/>	Hydrant yearly

Nesting using tasks instead of switching templates

(Version 15 Style)

This new method uses ONE TEMPLATE.

- You link in tasks for each service instruction to the template
- You set up the frequencies for the services in the nesting tab
- You go back to the task tab to set the tasks to trigger by frequency.

Step 1.

You must first set up frequencies in the Nesting tab, (The same way as described for the other method). However, you DO NOT link in separate templates for each frequency.

The screenshot shows the MAINTSTAR PM TEMPLATE interface. The 'Nesting' tab is selected, displaying a table with the following data:

ADD	Edit	Nesting	Nest Description	Multiplier	Based On	Exclusive	Use Template
<input type="checkbox"/>	<input type="checkbox"/>	N1	monthly	1	Frequency	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	N2	6 month	6	N1	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	N3	yearly	12	N1	<input checked="" type="checkbox"/>	

Two red callout boxes provide additional context:

- One callout points to the 'Nesting' tab in the navigation bar, stating: "Create Nesting frequencies but do not link Templates to each frequency."
- Another callout points to the 'Use Template' column in the nesting table, stating: "NO linked templates."

Step 2.

Once you have the frequencies set up in the nesting section, go back to the task tab.

You are now ready to add in tasks. It is best to put them in a logical order. Put the tasks that are in the shortest frequency at the top and work your way down to the next NEW tasks and so on. You only need to put the tasks in once.

When you have the tasks entered, select the nesting drop down on the right for each. All the tasks that are for the shortest frequency will be set to n1. Then the tasks that add to the n1 tasks for the next higher frequency should be set for N2. The next higher frequency tasks should be set for N3 and so forth. This method is cumulative, N1 is your base set of tasks. These appear on every frequency cycle. The N2 tasks add to the n1 and so forth.

As the PMs are issued the system will now add these tasks to the Pm according to this schedule.

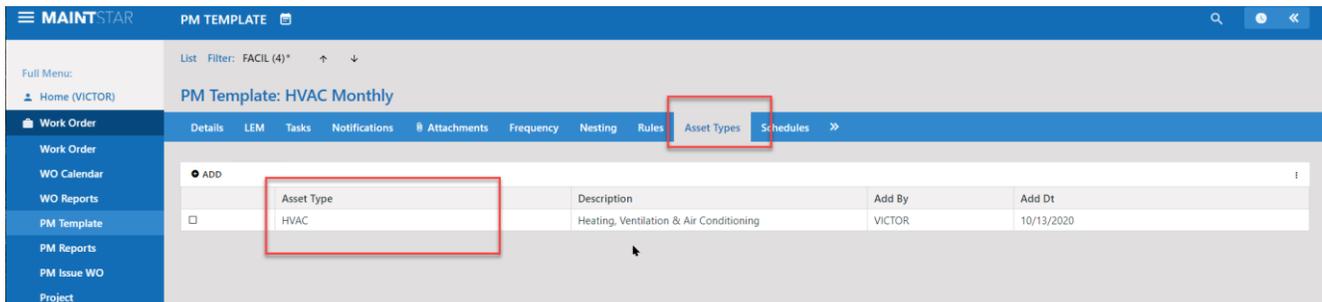
The screenshot shows the MAINTSTAR PM TEMPLATE interface. The left sidebar contains a navigation menu with options like Home (BSMITH), Work Order, Work Order Calendar, Work Order Reports, PM Template, PM Reports, PM Issue WO, Project, Crew, Checklist, Backflow, and Mass Deletion. The main area displays a list of templates and a detailed view for 'PM Template: HVAC Monthly'. The 'Tasks' tab is active, showing a table of tasks with columns for Seq No, Task ID, Task Description, Meter Type, Result Type, Required, and Nesting. A dropdown menu is open for the 'Nesting' column of task 2, showing options: N1, N1-monthly, N2-6 month, and N3-yearly. Red callout boxes provide instructions: 'New way to nest: Use tasks on one template' points to the task list, and 'Tasks appear on nesting cycle' points to the dropdown menu.

Template Id	No of Sch.	Workgroup	TM Description	WO Description
Gen 3 HVAC PM	0	FLEET		
HVAC #	5	FACIL		PM HVAC. Check for debris, clean areas, test temperature.
HVAC 30 Day	1	FACIL		
HVAC Monthly	1	FACIL		
HVAC No.4	1	FACIL		

Seq No	Task ID	Task Description	Meter Type	Result Type	Required	Nesting
1	HVAC Check Belts	Check/Replace Belts on HVAC			N	N1
2	HVAC Check Freon	Check/Replace Freon on HVAC			N	N1-monthly
3	HVAC Check Valve	Check/ Replace Valve on HVAC			N	N1-monthly
4	HVAC Replace Bearing	HVAC Replace Bearing			N	N2-6 month

Asset types

The “Asset types” tab is optional. It allows you to select one or more asset types to be associated to this template. This will control what types of assets can be used with this template. If there are asset types setup here, then on the “Scheduling” tab you will only see these asset types as choices.



The screenshot displays the MAINTSTAR PM Template interface. The top navigation bar includes the MAINTSTAR logo, the title "PM TEMPLATE", and a search icon. Below this, a breadcrumb trail shows "Home (VICTOR)" and "PM Template: HVAC Monthly". The main navigation tabs are "Details", "LEM", "Tasks", "Notifications", "Attachments", "Frequency", "Nesting", "Rules", "Asset Types", and "Schedules". The "Asset Types" tab is highlighted with a red box. Below the tabs, there is a table with the following columns: "Asset Type", "Description", "Add By", and "Add Dt". A red box highlights the "Asset Type" column, which contains the entry "HVAC". The "Description" column contains "Heating, Ventilation & Air Conditioning", "Add By" contains "VICTOR", and "Add Dt" contains "10/13/2020".

Asset Type	Description	Add By	Add Dt
<input type="checkbox"/> HVAC	Heating, Ventilation & Air Conditioning	VICTOR	10/13/2020

Scheduling

The Scheduling Tab is where you build the PM. While on the template, open the scheduling tab.

The top section of the screen is where you link assets to the template. You will also add in the last due date for each asset or group of assets. This is necessary. The 'Last due date' will allow the system to calculate when the service is due again.

Last due date + frequency= next due date

To select the asset line, click on the schedule number. The line will turn blue to show it is selected. If you click on the asset id you will leave this screen and go to the detail screen for the asset. When you select an asset in this manner, showing the line blue highlighted, the details appear in a schedule box below.

Step 1.

Add an asset to the template using the 'Add Asset' button. In this example we are working with HVAC units. Select an HVAC and save. If you want to have several assets on the same Pm work order, select "Add Group" The group pop up will give you a choice of selecting a pre-made group of assets or selecting several assets together on the fly.

Note: The template can be used to make many PMs with different assets. When you add multiple lines of assets, **each line will create a pm.**

- If the asset line has only one asset, it will be a single asset pm.
- If the line has a group of assets in it the pm will be created with all the assets in the group on the same PM.

The screenshot shows the MAINTSTAR Scheduling Tab interface. The table below is a representation of the data shown in the image:

Sch#	Asset ID	Asset Type	Open PM WO	Last Due Date	Next Due Date	Due	Last Done Meter	Current Meter	Next Due Meter
1	10	Group		10/08/2020	11/02/2020	<input type="checkbox"/>			
2	HVAC-2	HVAC		10/05/2020	11/02/2020	<input type="checkbox"/>			

Red callout boxes in the image point to the 'Group of assets' button, the 'Single asset' button, and the 'Last Due Date' field. A text box states: 'Enter last done date and the system will calculate the NEXT due'.

PM Work Order Issue

The Menu Item PM WO Issue has 3 tabs:

1. **Create WO from Pm** - Here you can preview PMs due now or coming due in the future. You can select the preview with many criteria. You can select the previewed PMs with a checkbox and issue them.
2. **Batch Issue Setup** - This screen allows you to set up conditions for PMs to be automatically generated. You can manually issue a batch as well.
3. **PM Log** - List of PMs issued by the system.

The 'Create WO from PM' Screen

The screenshot displays the 'PM ISSUE WO' screen in the MAINTSTAR Asset Management system. The interface is divided into several sections:

- Navigation:** A sidebar menu on the left and a top navigation bar with tabs for 'Create WO From PMs', 'Batch Issue Setup', and 'PM Log'.
- Search Filters:** A central area with dropdown menus for 'Workgroup' (set to 'FACIL'), 'Account Number', 'Customer ID', 'Asset Type', 'Location', 'Template No', and 'Priority', all currently set to 'All'.
- Due Date Selection:** Four 'Due in the next' fields on the right, each with a numeric input and a unit dropdown (Days, Hours, Miles).
- Action Buttons:** Three buttons at the bottom: 'PRINT', 'PREVIEW', and 'CREATE WO FROM SELECTED ROWS'.
- Table:** A table listing PMs with columns: WorkGroup, Template Number, Sch No., Asset ID, Asset Type, Due, Sch Type, Cycle, Nesting, Cal Freq, Cal Unit, Due Date, Last Done Date, Meter Freq, Meter Type, Last Done Meter, and Current. Two rows are shown, both for 'FACIL' workgroup and '00test' template.
- Row Count:** A label 'Row Count: 2' is positioned below the table.

The fields at the top of the screen allow you to select workgroup and other parameters. The fields on the right allow you to select what will be COMING due in the future by date or other parameters. The Preview button will display PMs that are due or coming due based on your selections. When you have made your selection click 'RUN' to see your results.

If you want to issue one or some of the PMs, click the checkbox that is to the left of the line, then click the "Create WO from the selected Rows" button and the work orders will be created.

Batch Issue Setup

This section allows you to set up timers that will issue your Pm work orders automatically for you. This new feature in version 15 is designed to make your life easier.

The screenshot displays the 'Batch Issue Setup' screen in the MAINTSTAR Asset Management system. The interface includes a sidebar menu on the left with 'PM Issue WO' highlighted. The main content area is titled 'PM ISSUE WO' and contains the following elements:

- Workgroup:** A dropdown menu set to 'FACIL'.
- Frequency:** Radio buttons for 'Weekly' (selected) and 'Monthly'.
- Every Week on:** A list of days with checkboxes: Monday (checked), Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- At time:** A text input field containing '---:--:--'.
- Recipients:** A text input field containing 'david@maintstar.com'.
- Due in the next:** Three input fields with dropdown menus: '3 Days', '0 Hours', and '0 Miles'.
- Server Date:** 2020-12-18
- Server Time:** 13:15:56
- Timezone:** America/Los_Angeles
- Calendar:** A calendar for December 2020 showing dates from 29 to 31.
- Buttons:** 'RUN PM NOW' and 'SAVE SCHEDULE' buttons.

To set up a Batch schedule:

- Select the work group
- Set time periods to run:
 - Weekly or Monthly
 - Which days to run
 - What time to run
 - Emails of people to be sent a report of each run
 - Optional fields in the upper right allow you to select PMs not due now but coming due.
- Save the schedule and the system will automatically issue PMs based on these settings.
- *NOTE the schedule will be executed on the SERVER time shown the screen. Please make your settings accordingly.*
- Run Now will execute this batch manually.

PM Log

The PM Log allows you to view a report of Pms that have been issued. You can select a date range and one or several different workgroups. Select run to generate the report on screen. Print will download a copy to print.

The screenshot displays the MAINTSTAR Asset Management interface for the 'PM ISSUE WO' section. The left sidebar contains a navigation menu with options like Home (BSMITH), Work Order, WO Calendar, WO Reports, PM Template, PM Reports, PM Issue WO, Project, Crew, Checklist, Backflow, Mass Deletion, Work Request, Asset, Asset Management, and Inventory. The main area shows the 'PM Log' tab selected, with a date range of 10/19/2020 to 12/18/2020 and a workgroup filter set to 'FACIL'. Below the filters are 'PRINT' and 'RUN' buttons. The main content is a table with 13 columns: Date Added, Added By, Workgroup, Template, Sch No., Work Order, WO Type, WO Descr, Asset Id, Asset Type, Location, Customer Id, and Customer Name. The table contains 6 rows of data.

Date Added	Added By	Workgroup	Template	Sch No.	Work Order	WO Type	WO Descr	Asset Id	Asset Type	Location	Customer Id	Customer Name
12/14/2020 07:38	System	FACIL	00test	1	F000024276			123	Boiler			
12/14/2020 07:38	System	FACIL	0test 5 days	2	F000024277			Boiler-1	Boiler			
12/14/2020 07:38	System	FACIL	0test 5 days	5	F000024278			11528	Car	034	DEBBIE	
12/14/2020 07:38	System	FACIL	2 month boiler	1	F000024279	PM	check for leaks, check pressure gauge check temperature gauge	WD3A3H502	wHYDRANT			
12/14/2020 07:38	System	FACIL	2 month boiler	1	F000024279	PM	check for leaks, check pressure gauge check temperature gauge	WD3C1H300	wHYDRANT			
12/14/2020 07:38	System	FACIL	2 month boiler	1	F000024279	PM	check for leaks, check pressure gauge check	WC3B4H503	wHYDRANT			

PM Reports

The PM Report section:

- **Due Service** - What Pms are due now?
- **Work Order Review** - Work orders made from Pm schedules and their status.
- **Template Review** - Shows what templates have been created for each workgroup
- **Overdue PM Wo Report** -Pm Work Orders Open for 1 to 30 days, 31 to 60 days, 61 to 90 days and over 91 days.
- **PM Due Soon Report** - Pms coming due in the future
- **Projected Cost** - Projected costs of PMs.

The screenshot displays the MAINTSTAR Asset Management software interface. The top navigation bar includes the MAINTSTAR logo and the title 'PM REPORTS'. Below the navigation bar, there are several tabs: 'Due Service', 'Work Order Review', 'Template Review', 'Overdue PM WO Report', 'PM Due Soon Report', and 'Projected Cost'. The 'Due Service' tab is currently selected.

On the left side, there is a 'Full Menu' sidebar with various options like 'Home (BSMITH)', 'Work Order', 'WO Calendar', 'WO Reports', 'PM Template', 'PM Reports', 'PM Issue WO', 'Project', 'Crew', 'Checklist', 'Backflow', 'Mass Deletion', 'Work Request', 'Asset', 'Asset Management', 'Inventory', 'Reporting', and 'Work Planning'. The 'PM Reports' option is highlighted.

The main content area features a search filter section with the following fields:

- Workgroup: FACIL x FLEET x
- Account Number: All
- Customer ID: All
- Asset Type: All
- Location: All
- Template No: All
- Priority: All

 Below the filters are 'PRINT' and 'RUN' buttons.

The data table below shows the following columns: WorkGroup, Template Number, Sch No., Asset ID, Asset Type, Priority, Account Number, Customer ID, Location, Due, PM Rel, Excl., Serv No., Cal Freq, Cal Unit, Meter Freq, Meter Type, and Meter Due with. The table contains four rows of data:

WorkGroup	Template Number	Sch No.	Asset ID	Asset Type	Priority	Account Number	Customer ID	Location	Due	PM Rel	Excl.	Serv No.	Cal Freq	Cal Unit	Meter Freq	Meter Type	Meter Due with
FACIL	00test	1	123	Boiler					<input checked="" type="checkbox"/>				1	Days			0
FACIL	Otest 5 days	1	Floor-01	Building					<input checked="" type="checkbox"/>				5	Days	1000	Miles	0
FACIL	Otest 5 days	3	Basement-1	BASEMENT					<input checked="" type="checkbox"/>				5	Days	1000	Miles	0
FLEET	test 5 days float	1	Auto 1	Auto				001	<input checked="" type="checkbox"/>				5	Days			0

Row Count: 4