



## How to setup your PM's and run reports for your QA In SynergyMMS

As properties start to use SynergyMMS for more, an innovative idea was brought to our attention, to use SynergyMMS to track and review for the Quality Assurance program. Following we will discuss the setup required for this and reports for reviewing progress.

- User Defined codes will need to be set for QA items
- Task codes will need to know about the QA user defined field
- PM Schedules will need to use the task code
- Reports will need to be run to show progress.

Setup:

We have both an example for Housekeeping, and one for Engineering following. However with a little imagination this could work for any area or department.

### Housekeeping

Mattress rotation (TC) – OtherQA (Search)

Carpet extraction (TC) – OtherQA (Search)

Marble cleaning (TC) – OtherQA (Search)

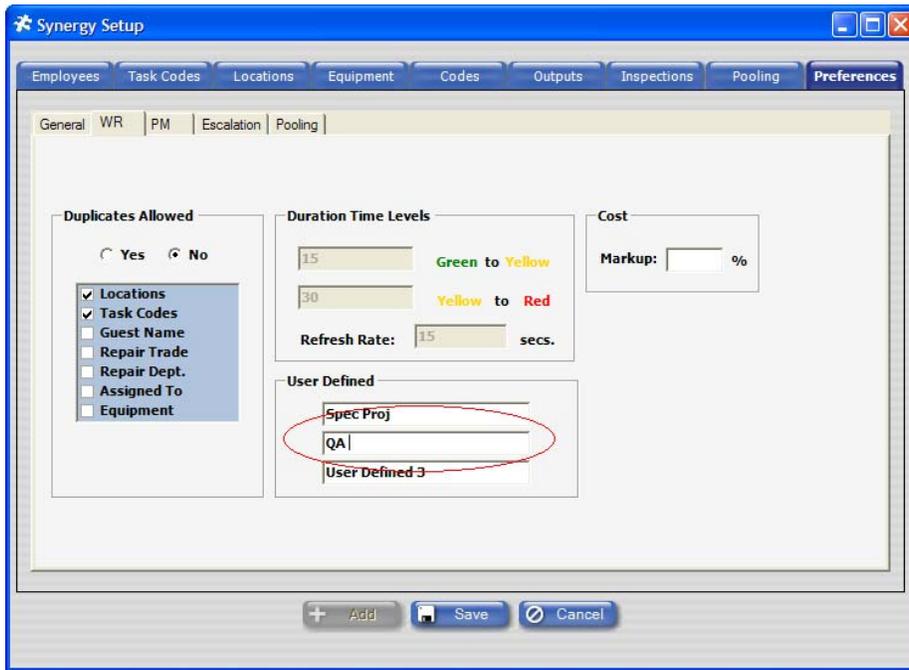
### Engineering

Room Insp (TC) – OtherQA (Search)

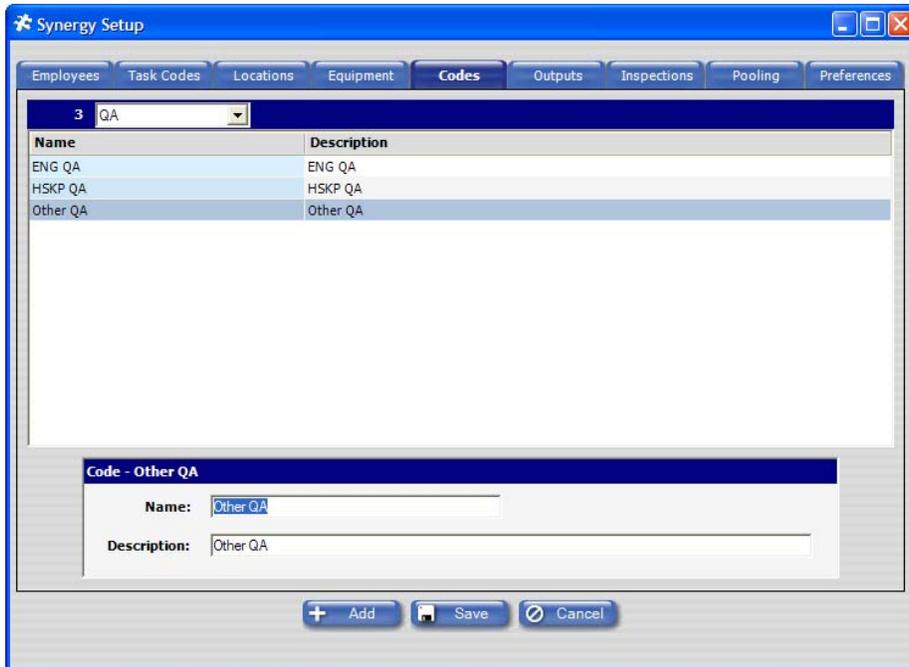
Filter change (TC) – OtherQA (Search)

AHH PM (TC) – OtherQA (Search)

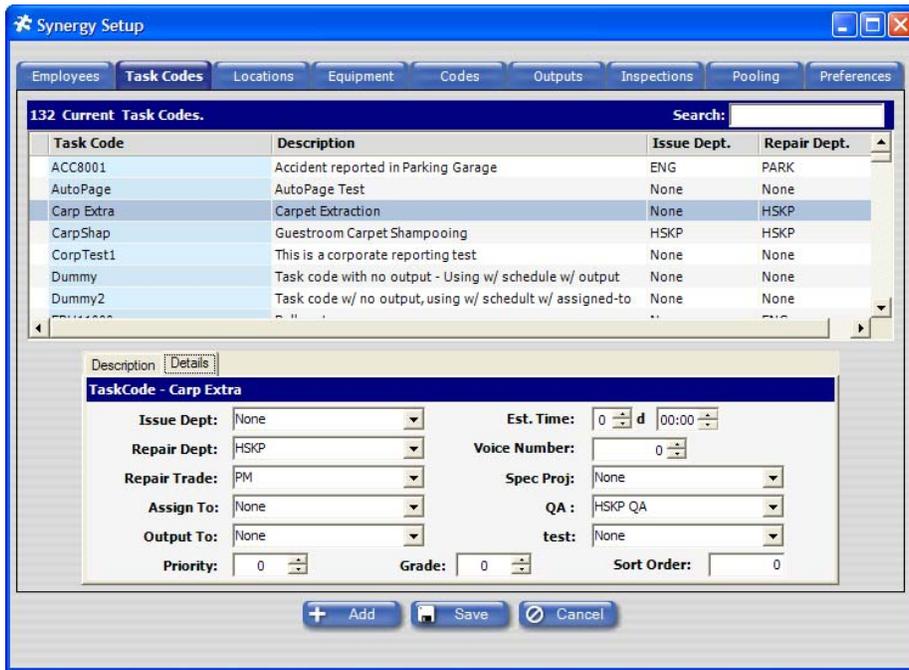
From the Toolbox select Setup and the Preferences. Set up your new user defined field as QA.



Now we need to add our QA code, select Codes. You can set up separate QA codes for each department, or if you are already using the department, you can set up one code called QA.

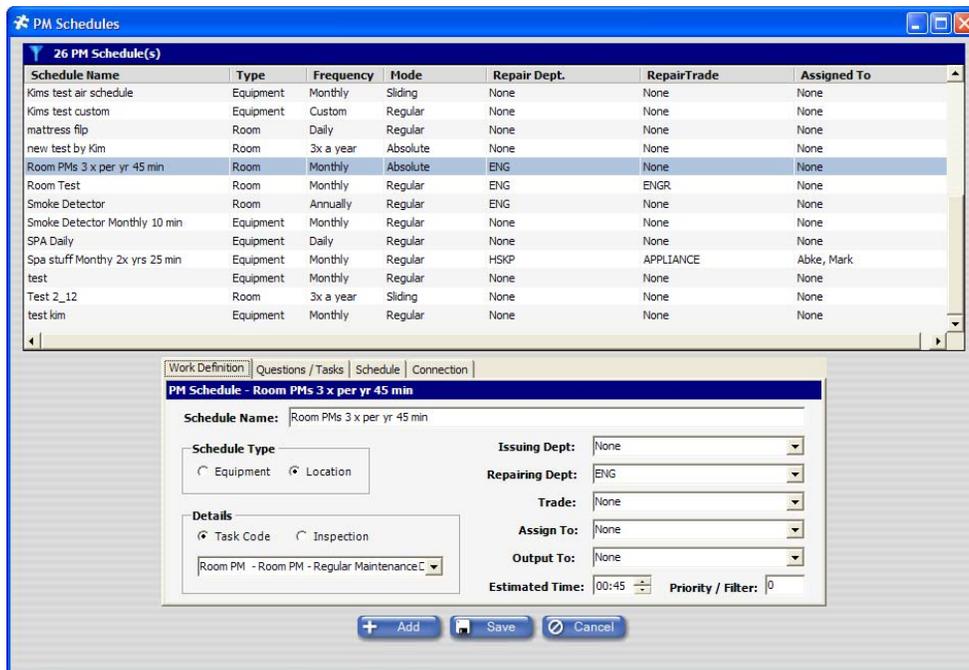


Setup task codes that we will use on our PM's



Basically what we are doing is setting SynergyMMS up so that we can pull reports on all items based on the task code, or a group of task codes.

The last and most important item is our PM Schedule which will use one of our task codes. If you need more details on adding PM's see SMMS\_FF\_4-PMs.pdf on our web site.



Work Definition | Questions / Tasks | **Schedule** | Connection

**PM Schedule - Room PMs 3 x per yr 45 min**

Auto Schedule Reset

**Schedule Mode**

Regular  Sliding  Absolute

**PM Generation Options**

Frequency: Monthly

Room Threshold: 0

**Date Options**

Start Date: 1/27/2009

Repeat every 1 year(s).

Work Definition | Questions / Tasks | Schedule | **Connection**

**PM Schedule - Room PMs 3 x per yr 45 min**

**Not Connected**

Name	Type
10th floor store room	Store Rooms
787	None
794	None
795	None
BASEMENT1	BackHse
basement2	None
BASEMENT3	BackHse
BASEMENT4	BackHse

**Connected**

Name	Type
1001	Guest Room
786	Guest Room
2002	Guest Room
2001	Guest Room
2000	Guest Room
2003	Guest Room
1002	Guest Room
1003	Guest Room

Reset

Move

Move

All

All

In this example we have an Engineering PM schedule to inspect the room 3 times per year. We have set the task code to our Room PM which uses our QA search field (note that this field does not show on the PM, but all fields that are part of the task code are incorporated in to the generated PM/WR).

### Reports to pull for QA

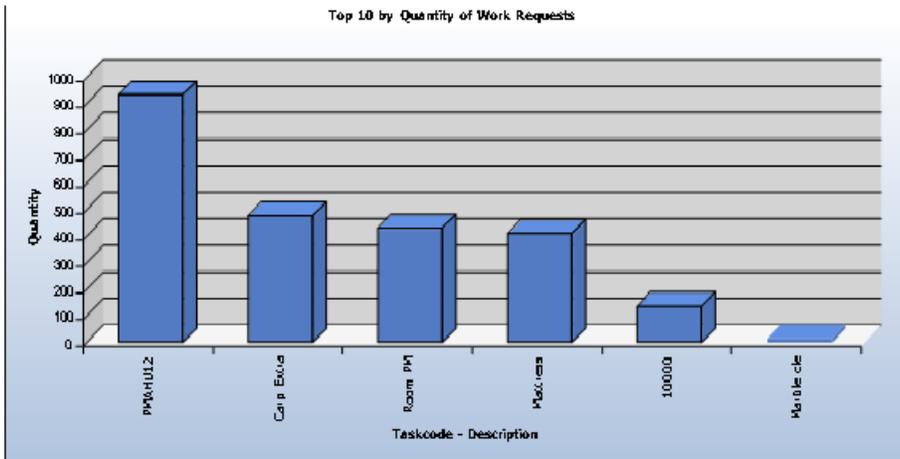
Now it is time to reap the rewards of our set up. When your QA comes due here are the reports that will be needed. This should provide a huge time and paper savings. Many properties store binders of work for this process and then have to make sure that it is compiled and organized correctly for the QA. This process can take days. Running the reports in SynergyMMS will take minutes, and can be done by the QA inspector if you set them with an easy login of QA.

Summary Report by Task or by Search:



**SAI .Net 2.0 Demo**  
**All (Open and Closed) Work Requests By Task Code**  
 1/1/2009 - 5/7/2009

Top 10 by Quantity of Work Requests



Task - Description	Guest	Internal	Quantity	% of Work
<a href="#">10000-Filter Change</a>	0	135	135	5.6%
<a href="#">Carp Extra-Carpet Extracdon</a>	0	475	475	19.8%
<a href="#">Marble cle-Marble cleaning</a>	0	15	15	.6%
<a href="#">Mattress -Mattress Rotation</a>	0	407	407	17.0%
<a href="#">PMAHU12-Annual Air Handler PM Routine</a>	0	933	933	39.0%
<a href="#">Room PM -Room PM - Regular Maintenance</a>	0	428	428	17.9%
<b>Total</b>	<b>0</b>	<b>2393</b>	<b>2393</b>	<b>100.0%</b>

This report will give an overview of all of the work of a particular type that is in SynergyMMS.

In our example, we have filtered by PM's only, and QA only. However, due to the way with have set up our PM's in SynergyMMS we are able to filter by Department and Task Code also.

Report Filter: User 2 = Other QA, PM Only, Date Opened >=2009-01-01 and Date Opened <= 2009-05-08, Guest=All, Status=All



## SAI .Net 2.0 Demo

### All (Open and Closed) Work Requests By Location

1/1/2009 - 5/7/2009

<u>Location</u>	<u>Guest</u>	<u>Internal</u>	<u>Quantity</u>	<u>% of Work</u>
<a href="#">1001</a>	0	6	6	1.4%
<a href="#">1002</a>	0	6	6	1.4%
<a href="#">1003</a>	0	6	6	1.4%
<a href="#">1004</a>	0	6	6	1.4%
<a href="#">1005</a>	0	5	5	1.2%
<a href="#">1006</a>	0	5	5	1.2%
<a href="#">1007</a>	0	5	5	1.2%
<a href="#">1008</a>	0	5	5	1.2%
<a href="#">1009</a>	0	5	5	1.2%
<a href="#">1010</a>	0	5	5	1.2%
<a href="#">1011</a>	0	5	5	1.2%
<a href="#">1012</a>	0	5	5	1.2%
<a href="#">1013</a>	0	5	5	1.2%
<a href="#">1014</a>	0	5	5	1.2%
<a href="#">1015</a>	0	5	5	1.2%
<a href="#">1016</a>	0	5	5	1.2%
<a href="#">1017</a>	0	5	5	1.2%
<a href="#">1018</a>	0	5	5	1.2%
<a href="#">1019</a>	0	5	5	1.2%
<a href="#">2000</a>	0	5	5	1.2%
<a href="#">2001</a>	0	4	4	.9%
<a href="#">2002</a>	0	5	5	1.2%
<a href="#">2003</a>	0	5	5	1.2%
<a href="#">2004</a>	0	5	5	1.2%
<a href="#">2005</a>	0	5	5	1.2%
<a href="#">2006</a>	0	5	5	1.2%
<a href="#">2007</a>	0	5	5	1.2%
<a href="#">2008</a>	0	5	5	1.2%
<a href="#">2009</a>	0	5	5	1.2%
<a href="#">3000</a>	0	5	5	1.2%
<a href="#">3001</a>	0	5	5	1.2%
<a href="#">3002</a>	0	5	5	1.2%
<a href="#">3003</a>	0	5	5	1.2%
<a href="#">3004</a>	0	5	5	1.2%
<a href="#">3005</a>	0	5	5	1.2%
<a href="#">3006</a>	0	5	5	1.2%
<a href="#">3007</a>	0	5	5	1.2%
<a href="#">3008</a>	0	5	5	1.2%
<a href="#">3009</a>	0	5	5	1.2%
<a href="#">4000</a>	0	4	4	.9%
<a href="#">4001</a>	0	4	4	.9%
<a href="#">4002</a>	0	4	4	.9%
<a href="#">4003</a>	0	4	4	.9%
<a href="#">4004</a>	0	4	4	.9%
<a href="#">4005</a>	0	4	4	.9%
<a href="#">4006</a>	0	4	4	.9%
<a href="#">4007</a>	0	4	4	.9%
<a href="#">4008</a>	0	4	4	.9%
<a href="#">4009</a>	0	4	4	.9%
<a href="#">5000</a>	0	4	4	.9%

In this example we have filtered by PM's only, QA, and a specific task code. This shows all the rooms that have been touched by this task code job.

Report Filter: User 2= Other QA, Task Code = Room PM - Room PM - Regular Maintenance, Date Opened >=2009-01-01 and Date Opened <= 2009-05-08, Guest=All, Status=All



## SAI .Net 2.0 Demo

### All (Open and Closed) Work Requests By Date

1/1/2009 - 5/7/2009

<u>Opened Date</u>	<u>Guest</u>	<u>Internal</u>	<u>Quantity</u>	<u>% of Work</u>
<a href="#">01/08/2009</a>	0	1	1	16.7%
<a href="#">01/25/2009</a>	0	1	1	16.7%
<a href="#">02/22/2009</a>	0	1	1	16.7%
<a href="#">03/29/2009</a>	0	1	1	16.7%
<a href="#">04/26/2009</a>	0	1	1	16.7%
<a href="#">05/03/2009</a>	0	1	1	16.7%
<b>Total</b>	<b>0</b>	<b>6</b>	<b>6</b>	<b>100%</b>

Taking it one step farther. The QA inspector can run a report in SynergyMMS to pull all PM's, that are part of QA, with a specific task code, for a specific room. Now you can see all of the time the room as been touched. In our case you can tell that this PM is a Monthly PM.

Report Filter: User 2 = Other QA, Location = 1004, Task Code = Room PM - Room PM - Regular Maintenance , Date Opened >= 2009-01-01 and Date Opened <= 2009-05-08, Guest=A, State=A

Full Detail Report by location / equipment and task or search field: This report will show the detail of what was actually done during the PM.



**SAI .Net 2.0 Demo**  
**All (Open and Closed) Work Requests WR Full Detail**  
 1/1/2009 - 5/7/2009

This report will show the detail of what was actually done during the PM.

**Work Request #:** 13049  
**Opened:** 04/26/2009 10:06 AM  
**Scheduled For:** 04/26/2009 10:06 AM  
**Task Codes:** Room PM  
**Reporting Dept:** Not Assigned  
**Assigned To:** Not Assigned  
**Location:** 1004  
**Repair Dept:** ENG  
**Equipment:** Not Assigned  
**Trades:** ENGR  
**Search 1:** None  
**Output:**  
**Search 2:** Other QA  
 ECT: 45  
**Search 3:** None

**Description:** Room PM - Regular Maintenance

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K	N	E	P																						
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Legend: PNT=Paint, REP=Repair, RPL=Replace

**AIR CONDITIONING**

A/C unit (check operation) -----[       ]	Lubricate drawer guides as needed -----[       ]
Thermostat (secure and functioning) -----[       ]	Clean or touch up stains -----[       ]
Filters and grills clean -----[       ]	Check springs on chairs -----[       ]
Condensate water drain (clean) -----[       ]	Check table tops (rep small nicks) -----[       ]
Blower fan (secure , replace) -----[       ]	WINDOWS
Check for leaks in water system -----[       ]	Lubricate Window guides and stops -----[       ]
Check plug and outlet (rep as nec) -----[       ]	Check & Secure Mirror Hangers -----[       ]
LAMPS	Check & Secure Window hardware -----[       ]
Switches (check operation) -----[       ]	WALL - FLOOR - CEILING - DRAPES
Lamp sockets (tighten) -----[       ]	Check Baseboards / Carpet / Picture -----[       ]
Lamp shades (repair or replace) -----[       ]	Check Ceiling (cracks/mildew/etc) -----[       ]
Bulbs - check wattage (replace) -----[       ]	Check Paint / Vinyl / Floor Casing -----[       ]
Plugs (replace as necessary) -----[       ]	Inspect & Secure Drapery Hardware -----[       ]
SWITCHES	DOORS
Outlet wallplates (clean, secure) -----[       ]	Check and Secure Handles -----[       ]
Switches / receptacles - replace miss -----[       ]	Check Lock cylinder set screw -----[       ]
Receptacles - change as necessary -----[       ]	Secure and Lubricate Hinges and Pin -----[       ]
TV'S AND RADIOS	Check and Secure Lock Striker Plate -----[       ]
Radio check timeand opeation -----[       ]	Replace Door Frame Bumpers if needed -----[       ]
TV audio/visual (check TV channels) -----[       ]	Check Fire Exit Plan & Room Rate Card -----[       ]
Replace knobs if necessary -----[       ]	SLIDING DOORS
Adjust fine tuning if necessary -----[       ]	Check / Repair Sliding Door tracks -----[       ]
Secure cable outlet plate -----[       ]	Check Floor Guides -----[       ]
Check remote and satellite cinema box -----[       ]	Check Bumpers -----[       ]
Check security mount of TV and radio -----[       ]	BATHROOM
PHONES	Bath Tub Safety - Check Slip Guard -----[       ]
Check dialing instructions -----[       ]	Check Toilet Flush Valve -----[       ]
Note any defects -----[       ]	Inspect Toilet Seat (rep as needed) -----[       ]
FURNITURE	Check Shower Door / Tracks / Bumpers -----[       ]
Check floor door stop and door handle -----[       ]	Secure Handle on mixing valve -----[       ]
Check drawer handle and knobs -----[       ]	

**Comments:** Room PMs 3 x per yr 45 min

**Completion:**

Report Filter: WR Number=13049, Date Opened >=2009-01-01 and Date Opened <= 2009-05-08, Guest=All, Status=All

