Feature Focus

SynergyMMS PM Calendar

SynergyMMS now offers a calendar view of your property's Preventive Maintenance. The calendar offers both an Annual and Monthly view to see how well the PM's have been balanced. There is also a Daily view that allows for changes to be made to future instances of a PM/WR.

The Annual and Monthly views – each displayed using the Year and Month tabs respectively - show the total hours and number of PM's tasks forecasted. There are arrow buttons on the corners of the view that bring up the previous or next month/year data for ease of navigation. Double-clicking on a month in the Annual view will display that month. From this view the details of a single day are displayed by double-clicking on a single date. These views allow for filtering by Type (Location / Equipment), Repair Dept, Trade or Assigned To employee. You can also look into the future and see what is due next month or next year.

Annual view- Notice the total number of PM's and total hours in the top dark blue bar. This will update when switching to the monthly view or applying any filters.

Monthly view- Each day has the number of forecasted PM tasks along with the hours.

Filters- Filters are available that allow you to see just the PM tasks that belong to rooms or equipment, a particular trade or department or an individual.

The Daily view shows details of the PM/WR due to generate on the day selected. It is on the Daily view that editing of an instance of a PM/WR, forecasted to generate in the future, is allowed.

Selecting an instance of the PM/WR and right-clicking will display the edit box (as seen to the left of this text).

The Assigned To and Schedule For Date fields can be modified. There are rules for the edits that are allowed (see **Rules for editing an instance of a PM/WR** at the end of this document).

Notice that when an instance is changed SynergyMMS displays the date the change was made and color codes the instance. This change does not affect the original PM Schedule. For example, if you delete a forecasted PM/WR that is due the 10th of this month, the PM Schedule will still generate a new instance of that PM/WR for the appropriate date next month.

PM/WR that have already generated will show the WR number. In the case where the WR has already generated editing must take place in the Work Request view.

Along with our Calendar view, version 2 of SynergyMMS also offers Weekly generation of PM/WR. This is modified under the Preferences area of Setup. If PM's are set to generate weekly on Wednesday, the PM Calendar view will display all forecasted PM's on Wednesdays, instead each of the days of the week.

PM's can also be set to output to a printer, or to the defined output of the Schedule.

The calendar is a great tool for understanding the impact of the PM forecast on your property and your staff. It is an excellent way to modify PM/WR due to vacation/sick time, or high occupancy and can also be used to forecast staffing requirements in support of the PM program.

Rules for editing an instance of a PM/WR:
- No 'backward' movement – Since the PM Calendar deals with forecasted PM's, an instance cannot be rescheduled prior to the current day.
- Multi select of PM/WR instances on the Daily PM view will not allow changes to the Scheduled For Date.
- Multi select of PM/WR instances on the Daily PM view will allow changes to Assigned To employee.
- Sliding Mode PM's Scheduled For Date cannot be modified; only Assigned To employee may be changed.
- Regular or Absolute PM's allow for Scheduled For Date changes within their frequency on single select.
- Changing a single PM instance through the Daily PM interface will not affect future generation of the schedule.
- PM's with a frequency of Custom show on Sundays only.
- If a forecasted instance of a PM/WR is deleted there is a record added to the transactions table for tracking if needed.

The PM Calendar offers a new control over the property's Preventive Maintenance in SynergyMMS. We are excited about the many ways the calendar will help the property become more efficient.

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