



## 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.

PM Schedules Calendar			
Type: All	Repair Dept: All	Trade: All	Assigned To: All
Year: 2010 Total: 12843 PM's / 3418.17 Hours			
January, 2010	February, 2010	March, 2010	April, 2010
Equip: 317 / 144.67 Room: 1054 / 194.25 Total: 1371 / 338.92	Equip: 250 / 116.33 Room: 706 / 132.5 Total: 956 / 248.83	Equip: 294 / 137.08 Room: 740 / 141 Total: 1034 / 278.08	Equip: 262 / 120.33 Room: 838 / 183.25 Total: 1099 / 303.58
May, 2010	June, 2010	July, 2010	August, 2010
Equip: 272 / 123.42 Room: 749 / 147 Total: 1021 / 270.42	Equip: 292 / 135.17 Room: 734 / 137.75 Total: 1026 / 272.92	Equip: 317 / 144.67 Room: 1054 / 194.25 Total: 1371 / 338.92	Equip: 250 / 116.33 Room: 706 / 132.5 Total: 956 / 248.83
September, 2010	October, 2010	November, 2010	December, 2010
Equip: 293 / 135.17 Room: 721 / 135 Total: 1014 / 270.17	Equip: 270 / 123.17 Room: 838 / 186 Total: 1108 / 309.17	Equip: 294 / 137.08 Room: 740 / 141 Total: 1034 / 278.08	Equip: 262 / 120.33 Room: 838 / 183.25 Total: 1099 / 303.58

PM Schedules Calendar

Type:AllRepair Dept:AllTrade:AllAssigned To:All

YearMonth

July, 2010Total: 1104 PM's / 312.83 Hours

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27 Equip: 4 / 2.25 Room: 18 / 4.5 Total: 22 / 6.75	28 Equip: 7 / 1.25 Room: 18 / 4.5 Total: 25 / 5.75	29 Equip: 4 / 2.25 Room: 17 / 4.5 Total: 21 / 6.75	30 Equip: 32 / 15.75 Room: 19 / 4.5 Total: 51 / 20.25	1 Equip: 5 / 1.42 Room: 20 / 4.5 Total: 25 / 5.92	2 Equip: 4 / 1.25 Room: 17 / 4.5 Total: 21 / 5.75	3 Equip: 4 / 2.25 Room: 18 / 4.5 Total: 22 / 6.75
4 Equip: 4 / 2.25 Room: 18 / 4.5 Total: 22 / 6.75	5 Equip: 7 / 1.25 Room: 18 / 4.5 Total: 25 / 5.75	6 Equip: 4 / 2.25 Room: 17 / 4.5 Total: 21 / 6.75	7 Equip: 32 / 15.75 Room: 19 / 4.5 Total: 51 / 20.25	8 Equip: 16 / 8.25 Room: 105 / 4.5 Total: 121 / 12.75	9 Equip: 4 / 2.25 Room: 18 / 4.5 Total: 22 / 6.75	10 Equip: 3 / 1.25 Room: 18 / 4.5 Total: 21 / 5.75
11 Equip: 4 / 1.25 Room: 18 / 4.5 Total: 22 / 5.75	12 Equip: 5 / 3.25 Room: 18 / 4.5 Total: 23 / 7.75	13 Equip: 4 / 1.25 Room: 19 / 5.25 Total: 23 / 6.5	14 Equip: 33 / 15.75 Room: 17 / 4.5 Total: 50 / 20.25	15 Equip: 5 / 2.25 Room: 18 / 4.5 Total: 23 / 6.75	16 Equip: 5 / 2.42 Room: 19 / 4.5 Total: 24 / 6.92	17 Equip: 4 / 1.25 Room: 19 / 4.5 Total: 23 / 5.75
18 Equip: 4 / 2.25 Room: 17 / 4.5 Total: 21 / 6.75	19 Equip: 3 / 1.25 Room: 19 / 4.5 Total: 22 / 5.75	20 Equip: 4 / 1.25 Room: 20 / 4.5 Total: 24 / 5.75	21 Equip: 34 / 17.75 Room: 18 / 4.5 Total: 52 / 22.25	22 Equip: 3 / 1.25 Room: 16 / 3.75 Total: 19 / 5	23 Equip: 7 / 1.58 Room: 18 / 4.5 Total: 25 / 6.08	24 Equip: 5 / 2.25 Room: 18 / 4.5 Total: 23 / 6.75
25 Equip: 4 / 2.25 Room: 18 / 4.5 Total: 22 / 6.75	26 Equip: 8 / 2.25 Room: 109 / 4.5 Total: 117 / 6.75	27 Equip: 4 / 2.25 Room: 17 / 4.5 Total: 21 / 6.75	28 Equip: 32 / 15.75 Room: 19 / 4.5 Total: 51 / 20.25	29 Equip: 13 / 8.25 Room: 18 / 4.5 Total: 31 / 12.75	30 Equip: 8 / 2.75 Room: 107 / 4.9 Total: 115 / 51.75	31 Equip: 4 / 1.42 Room: 18 / 5.25 Total: 22 / 6.67

1234567

Unit Format: Count / Hours

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

PM Schedules Calendar			
Type:	Repair Dept:	Trade:	Assigned To:
All	All	All	Armstrong, George
All			
Equipment			
Rooms			
July, 2010		Total: 21 PM's / 8 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.

**Schedule Items For Date: Friday, July 31, 2009**

111 PM Schedule Item(s)

WR #	Item	Schedule Name	Description	Frequency	Schedule Date	Altered Date	Assigned To	Time (HH:mm)
709	carpet cleaning	clean the carpet		Quarterly	7/31/2009		Arnold, Megan	00:30
790	carpet cleaning	clean the carpet		Quarterly	7/31/2009		Arnold, Megan	00:30
1001	Mattress Rotation			Monthly	7/31/2009		None,	00:00
1002	Mattress Rotation			Monthly	7/31/2009		None,	00:00
1003	Mattress Rotation			Monthly	7/31/2009		None,	00:00
6008	Room PM			3x a year	7/31/2009		None,	00:00
1011	Room PMs 45 min	Room PMs 3 x per yr 45 min		Monthly	7/31/2009	7/31/2009	Armstrong, George	00:45
1012	Room PMs 45 min	Room PMs 3 x per yr 45 min		Monthly	7/31/2009	7/31/2009	Armstrong, George	00:45
1013	Room PMs 45 min	Room PMs 3 x per yr 45 min		Monthly	7/31/2009	7/31/2009	Armstrong, George	00:45
	SPA FILTER PUMP	SPA Daily	1. Verify proper connectio...	Daily	7/31/2009		None,	00:25
	SPA HEATER	SPA Daily	1. Verify proper connectio...	Daily	7/31/2009		None,	00:25
	SPA JET PUMP	SPA Daily	1. Verify proper connectio...	Daily	7/31/2009		None,	00:25

Legend: ☐ Normal Generated Items ☒ Altered Items

**Edit Selected Item(s)**

Assigned To:

Scheduled For Date:

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 10<sup>th</sup> 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.

**Synergy Setup**

Employees Task Codes Locations Equipment Codes Outputs Inspections Pooling **Preferences**

General WR **PM** Escalation Pooling

**Generator Run Frequency**

Generator Run: Daily on Wednesday

**PM Dispatch Options**

Dispatch To: Printer Printer: \\SAI-SRV11\\HP 5550

**PM Full Detail Options**

**PM Full Detail Additional Text:**

Use appropriate lockout procedures.

Use appropriate safety equipment.

+ Add Save Cancel

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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