



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)

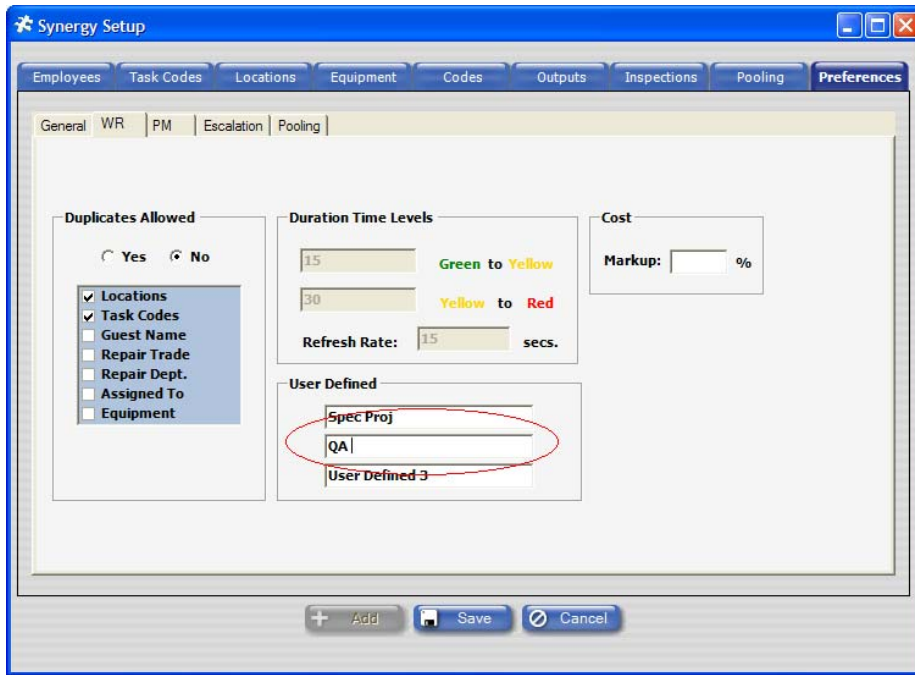
Engineering

Room Insp (TC) – OtherQA (Search)

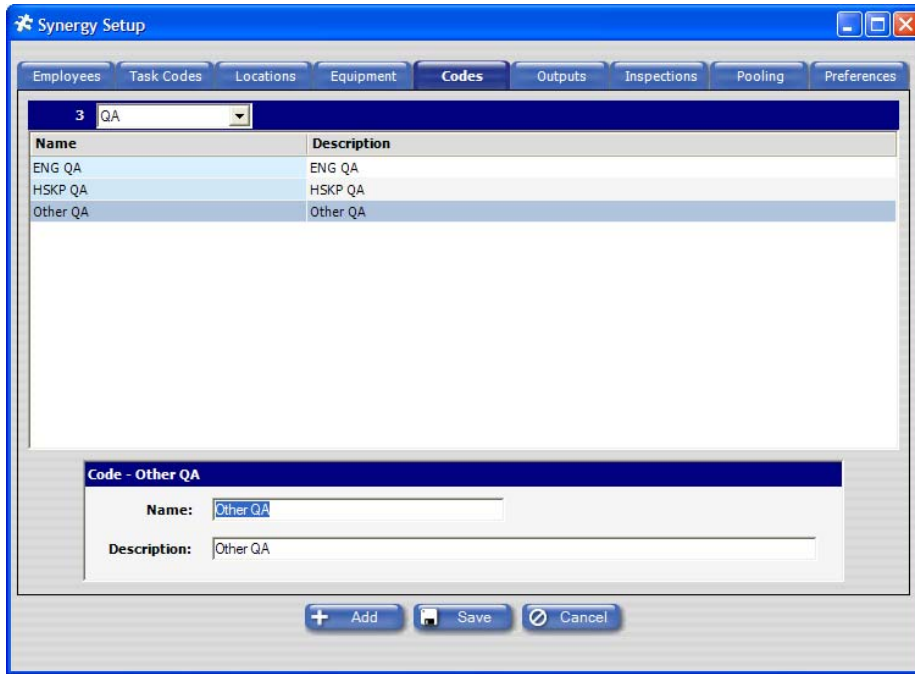
Filter change (TC) – OtherQA (Search)

AHH PM (TC) – OtherQA (Search)

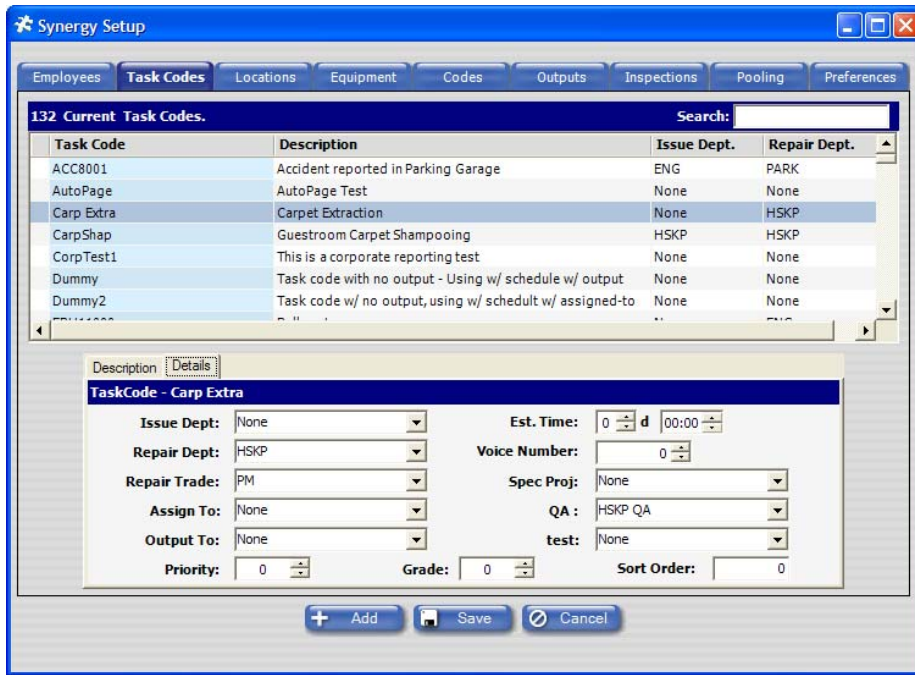
From the Toolbox select Setup and the Preferences. Set up your new user defined field as QA.



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.

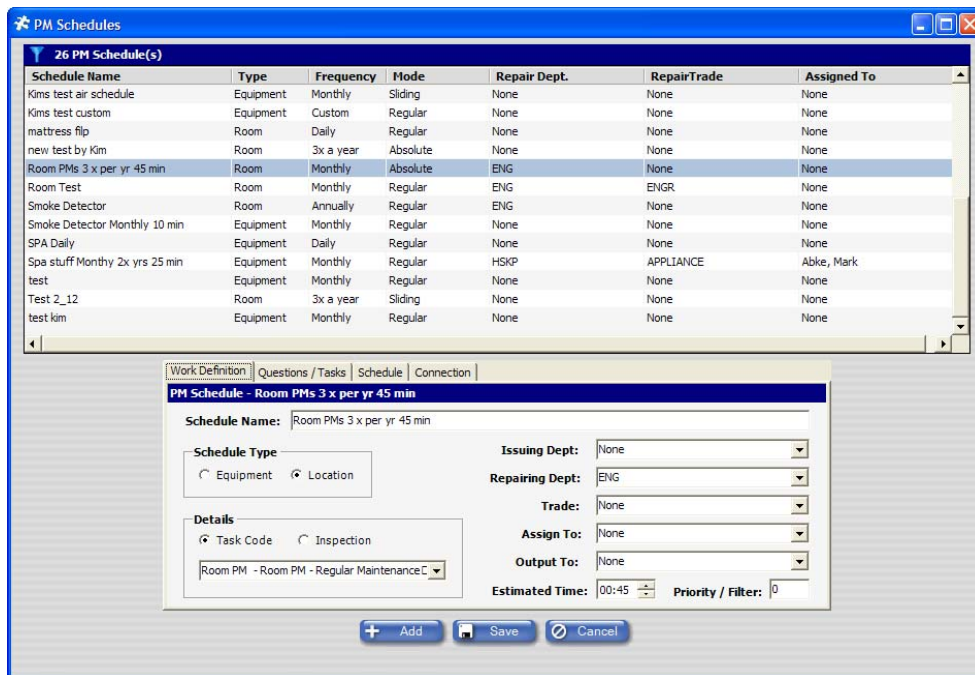


Setup task codes that we will use on our PM's



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 | | Connected | |
|-----------------------|-------------|-----------|------------|
| Name | Type | Name | Type |
| 10th floor store room | Store Rooms | 1001 | Guest Room |
| 787 | None | 786 | Guest Room |
| 794 | None | 2002 | Guest Room |
| 795 | None | 2001 | Guest Room |
| BASEMENT1 | BackHse | 2000 | Guest Room |
| basement2 | None | 2003 | Guest Room |
| BASEMENT3 | BackHse | 1002 | Guest Room |
| BASEMENT4 | BackHse | 1003 | Guest Room |

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

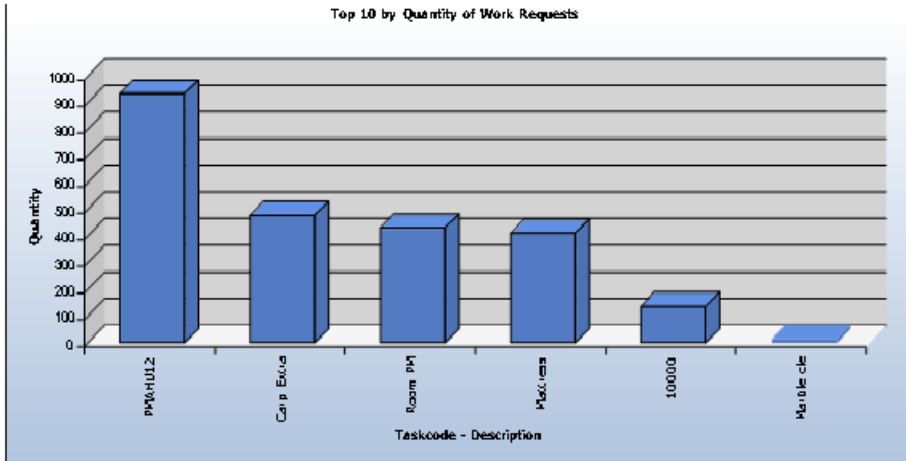
Now it is time to reap the rewards of our set up. When your QA comes due here are the reports that will be needed. This should provide a huge time and paper savings. Many properties store binders of work for this process and then have to make sure that it is compiled and organized correctly for the QA. 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 |
|--|----------|-------------|-------------|---------------|
| 10000-Filter Change | 0 | 135 | 135 | 5.6% |
| Carp Extra-Carpet Extration | 0 | 475 | 475 | 19.8% |
| Marble cle-Marble cleaning | 0 | 15 | 15 | .6% |
| Mattress -Mattress Rotation | 0 | 407 | 407 | 17.0% |
| PMAHU12-Annual Air Handler PM Routine | 0 | 933 | 933 | 39.0% |
| Room PM -Room PM - Regular Maintenance | 0 | 428 | 428 | 17.9% |
| Total | 0 | 2393 | 2393 | 100.0% |

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> |
|----------------------|--------------|-----------------|-----------------|------------------|
| 1001 | 0 | 6 | 6 | 1.4% |
| 1002 | 0 | 6 | 6 | 1.4% |
| 1003 | 0 | 6 | 6 | 1.4% |
| 1004 | 0 | 6 | 6 | 1.4% |
| 1005 | 0 | 5 | 5 | 1.2% |
| 1006 | 0 | 5 | 5 | 1.2% |
| 1007 | 0 | 5 | 5 | 1.2% |
| 1008 | 0 | 5 | 5 | 1.2% |
| 1009 | 0 | 5 | 5 | 1.2% |
| 1010 | 0 | 5 | 5 | 1.2% |
| 1011 | 0 | 5 | 5 | 1.2% |
| 1012 | 0 | 5 | 5 | 1.2% |
| 1013 | 0 | 5 | 5 | 1.2% |
| 1014 | 0 | 5 | 5 | 1.2% |
| 1015 | 0 | 5 | 5 | 1.2% |
| 1016 | 0 | 5 | 5 | 1.2% |
| 1017 | 0 | 5 | 5 | 1.2% |
| 1018 | 0 | 5 | 5 | 1.2% |
| 1019 | 0 | 5 | 5 | 1.2% |
| 2000 | 0 | 5 | 5 | 1.2% |
| 2001 | 0 | 4 | 4 | .9% |
| 2002 | 0 | 5 | 5 | 1.2% |
| 2003 | 0 | 5 | 5 | 1.2% |
| 2004 | 0 | 5 | 5 | 1.2% |
| 2005 | 0 | 5 | 5 | 1.2% |
| 2006 | 0 | 5 | 5 | 1.2% |
| 2007 | 0 | 5 | 5 | 1.2% |
| 2008 | 0 | 5 | 5 | 1.2% |
| 2009 | 0 | 5 | 5 | 1.2% |
| 3000 | 0 | 5 | 5 | 1.2% |
| 3001 | 0 | 5 | 5 | 1.2% |
| 3002 | 0 | 5 | 5 | 1.2% |
| 3003 | 0 | 5 | 5 | 1.2% |
| 3004 | 0 | 5 | 5 | 1.2% |
| 3005 | 0 | 5 | 5 | 1.2% |
| 3006 | 0 | 5 | 5 | 1.2% |
| 3007 | 0 | 5 | 5 | 1.2% |
| 3008 | 0 | 5 | 5 | 1.2% |
| 3009 | 0 | 5 | 5 | 1.2% |
| 4000 | 0 | 4 | 4 | .9% |
| 4001 | 0 | 4 | 4 | .9% |
| 4002 | 0 | 4 | 4 | .9% |
| 4003 | 0 | 4 | 4 | .9% |
| 4004 | 0 | 4 | 4 | .9% |
| 4005 | 0 | 4 | 4 | .9% |
| 4006 | 0 | 4 | 4 | .9% |
| 4007 | 0 | 4 | 4 | .9% |
| 4008 | 0 | 4 | 4 | .9% |
| 4009 | 0 | 4 | 4 | .9% |
| 5000 | 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> |
|----------------------------|--------------|-----------------|-----------------|------------------|
| 01/08/2009 | 0 | 1 | 1 | 16.7% |
| 01/25/2009 | 0 | 1 | 1 | 16.7% |
| 02/22/2009 | 0 | 1 | 1 | 16.7% |
| 03/29/2009 | 0 | 1 | 1 | 16.7% |
| 04/26/2009 | 0 | 1 | 1 | 16.7% |
| 05/03/2009 | 0 | 1 | 1 | 16.7% |
| Total | 0 | 6 | 6 | 100% |

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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| <table border="1" style="border-collapse: collapse; font-size: small;"> <tr><td>O</td><td>P</td><td>R</td><td>R</td></tr> <tr><td>K</td><td>N</td><td>E</td><td>P</td></tr> <tr><td>T</td><td>P</td><td>L</td><td></td></tr> </table> | O | P | R | R | K | N | E | P | T | P | L | | | <table border="1" style="border-collapse: collapse; font-size: small;"> <tr><td>O</td><td>P</td><td>R</td><td>R</td></tr> <tr><td>K</td><td>N</td><td>E</td><td>P</td></tr> <tr><td>T</td><td>P</td><td>L</td><td></td></tr> </table> | O | P | R | R | K | N | E | P | T | P | L | |
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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

| | |
|--|--|
| 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

| | |
|--|--|
| Outlet wallplates (clean, secure) -----[] | DOORS |
| Switches / receptacles - replace miss -----[] | Check and Secure Handles -----[] |
| Receptacles - change as necessary -----[] | Check Lock cylinder set screw -----[] |

TV'S AND RADIOS

| | |
|---|--|
| 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 -----[] |

PHONES

| | |
|---|---|
| Check dialing instructions -----[] | BATHROOM |
| Note any defects -----[] | Bath Tub Safety - Check Slip Guard -----[] |

FURNITURE

| | |
|---|---|
| Check floor door stop and door handle --[] | Check Toilet Flush Valve -----[] |
| Check drawer handle and knobs -----[] | Inspect Toilet Seat (rep as needed) -----[] |
| | Check Shower Door / Tracks / Bumpers -----[] |
| | Secure Handle on mixing valve -----[] |

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

