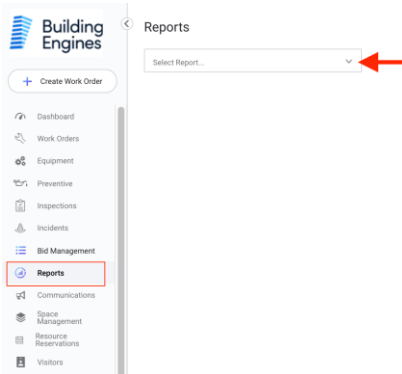


Reporting

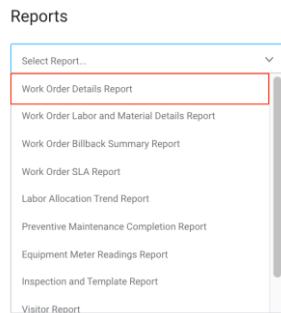
User Guide

Work Order Details Report

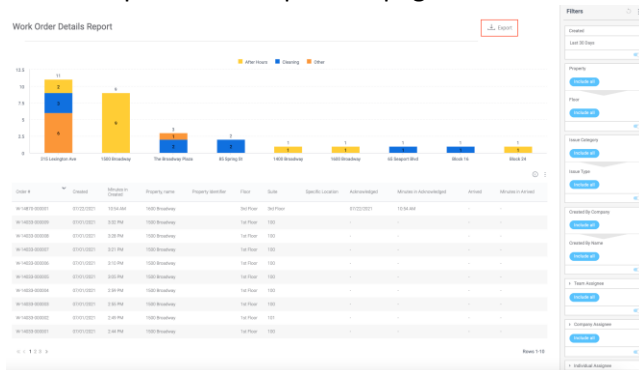
1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.



2. Click Work Order Details report from the drop down.



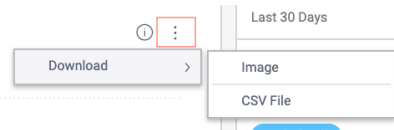
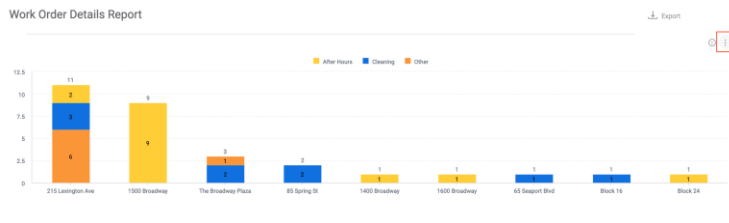
3. Click export at the top of the page to download the entire report.



4. Click on areas of the bar graph to view specific data.

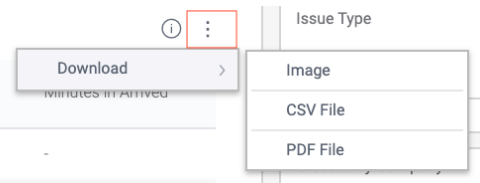


5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.



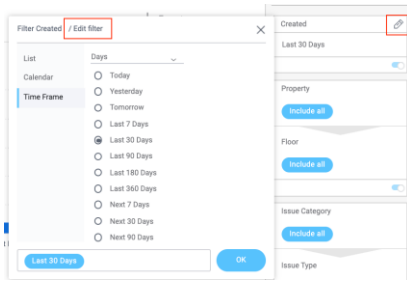
6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

Order #	Created	Minutes in Created	Property name	Property Identifier	Floor	Suite	Specific Location	Acknowledged	Minutes in Acknowledged	Arrived	Minutes in Arrived
W-1403-00001	07/22/2021	10:54 AM	1600 Broadway		3rd Floor	3rd floor		07/22/2021	10:54 AM	-	-
W-1403-00009	07/01/2021	3:32 PM	1500 Broadway		1st Floor	100		-	-	-	-
W-1403-00008	07/01/2021	3:28 PM	1500 Broadway		1st Floor	100		-	-	-	-
W-1403-00007	07/01/2021	3:21 PM	1500 Broadway		1st Floor	100		-	-	-	-
W-1403-00006	07/01/2021	9:10 PM	1500 Broadway		1st Floor	100		-	-	-	-
W-1403-00003	07/01/2021	3:05 PM	1500 Broadway		1st Floor	100		-	-	-	-
W-1403-00004	07/01/2021	2:59 PM	1500 Broadway		1st Floor	100		-	-	-	-
W-1403-00003	07/01/2021	2:55 PM	1500 Broadway		1st Floor	100		-	-	-	-
W-1403-00002	07/01/2021	2:49 PM	1500 Broadway		1st Floor	101		-	-	-	-
W-1403-00001	07/01/2021	2:44 PM	1500 Broadway		1st Floor	100		-	-	-	-

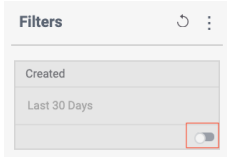


7. Filter the report using filter categories on the right-hand side of the page.

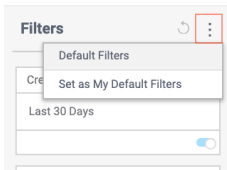
Hover at the top of a filter to click the pen icon and edit the filter.



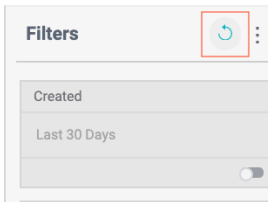
Click the toggle to disable a filter.



Click the three dots at the top of the filters bar to set default filters.

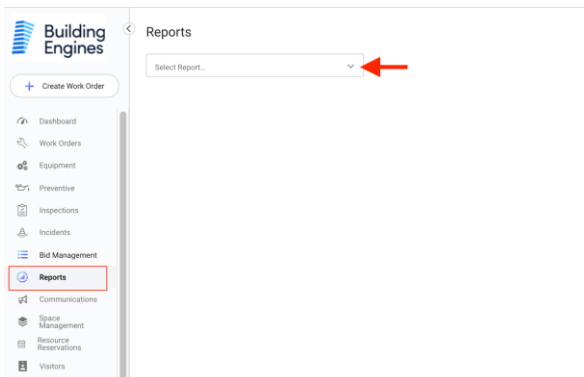


Click the back arrow next to the dots after making any changes to revert to default filter settings.



Work Order Billback Summary Report

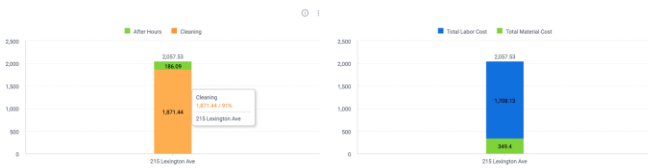
1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.



2. Click Work Order Billback Summary Report from the drop down.
3. Click export at the top of the page to download the entire report.



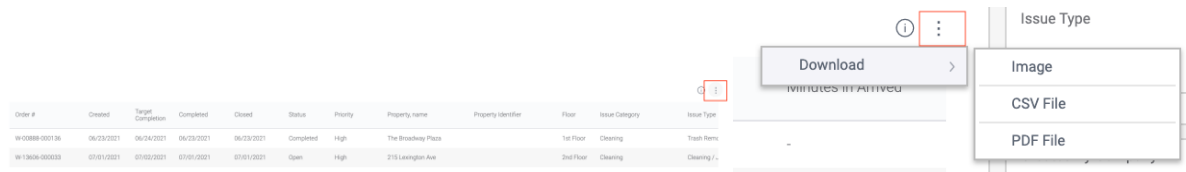
4. Click on areas of the bar graphs to view specific data.



5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

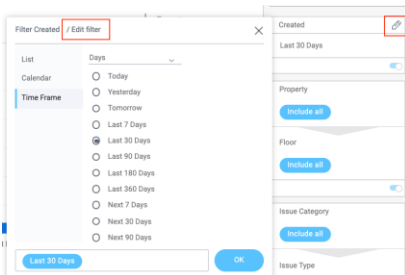


6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

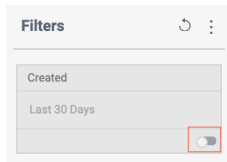


7. Filter the report using filter categories on the right-hand side of the page.

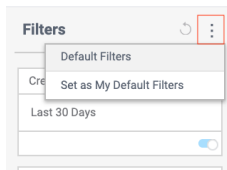
Hover at the top of a filter to click the pen icon and edit the filter.



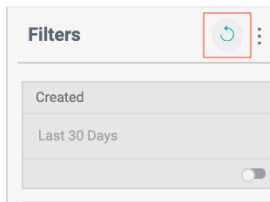
Click the toggle to disable a filter.



Click the three dots at the top of the filters bar to set default filters.

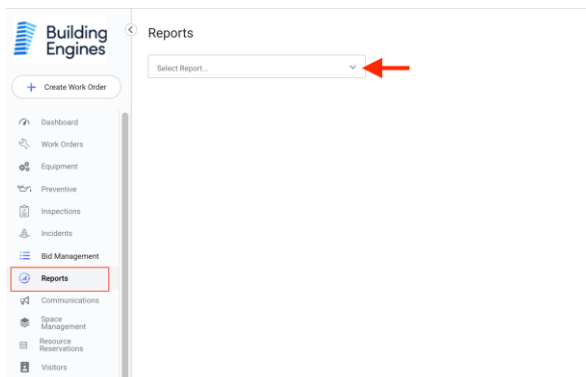


Click the back arrow next to the dots after making any changes to revert to default filter settings.



Work Order Labor and Material Details Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.



2. Click Work Order Labor and Material Details Report from the drop down.

3. Click export at the top of the page to download the entire report.



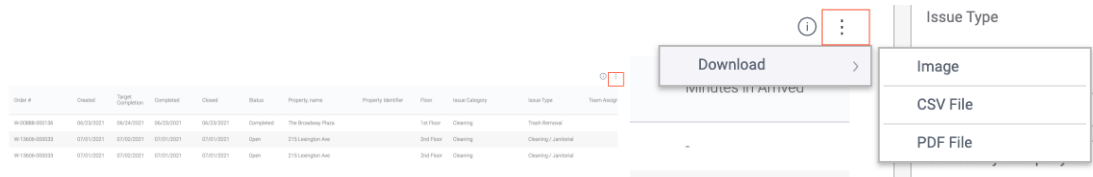
4. Click on areas of the graphs to view specific data.



5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.



6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.



7. Filter the report using filter categories on the right-hand side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.

Filter Created / Edit filter

Created: Last 30 Days

Property: Include all

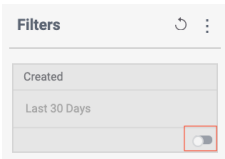
Floor: Include all

Issue Category: Include all

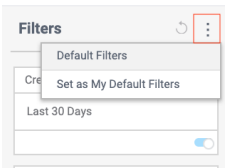
Issue Type: [Toggle]

Time Frame: Last 30 Days

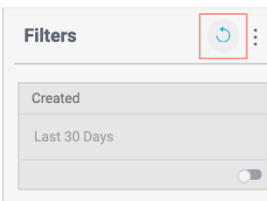
Click the toggle to disable a filter.



Click the three dots at the top of the filters bar to set default filters.

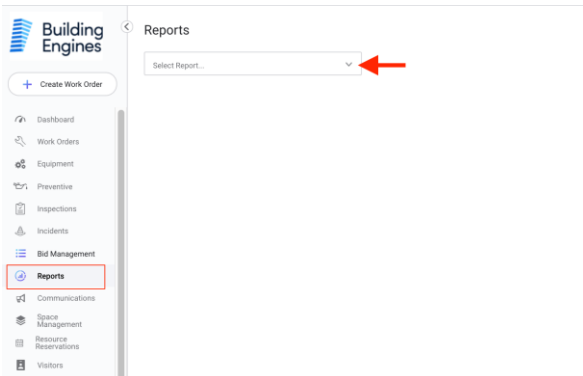


Click the back arrow next to the dots after making any changes to revert to default filter settings.



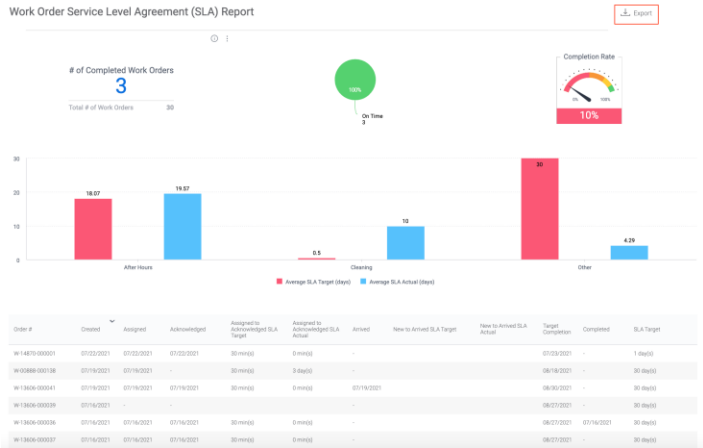
Work Order SLA Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.

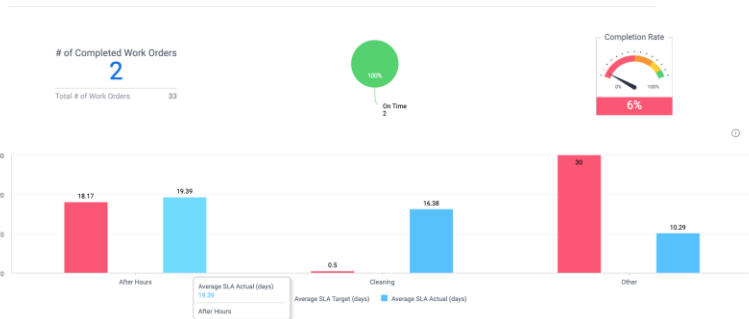


2. Click Work Order SLA Report from the drop down.

3. Click export at the top of the page to download the entire report.



4. Click on areas of the graphs to view specific data.



5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.



6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

Work Order Service Level Agreement (SLA) Report Export

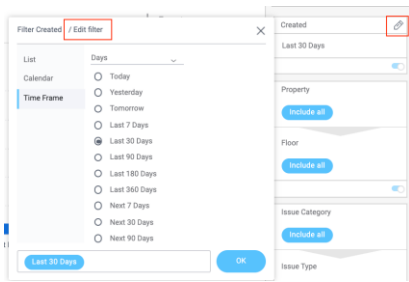
Order #	Created	Assigned	Acknowledged	Assigned to Acknowledge SLA Target	Assigned to Acknowledge SLA Actual	Arrived	New to Arrived SLA Target	New to Arrived SLA Actual	Target Completion	Completed	SLA Target
W14519-00001	07/02/2021	07/02/2021	07/02/2021	30 min	0 min	-	-	-	07/02/2021	-	1 day
W10088-000138	07/16/2021	07/16/2021	-	30 min	3 days	-	-	-	08/16/2021	-	30 days
W13004-000041	07/16/2021	07/16/2021	07/16/2021	30 min	0 min	07/16/2021	-	-	08/02/2021	-	30 days
W13004-000038	07/16/2021	-	-	30 min	-	-	-	-	08/02/2021	-	30 days
W13004-000037	07/16/2021	07/16/2021	07/16/2021	30 min	0 min	-	-	-	08/02/2021	07/16/2021	30 days
W13004-000036	07/16/2021	07/16/2021	07/16/2021	30 min	0 min	-	-	-	08/02/2021	-	30 days
W10204-000011	07/16/2021	-	-	30 min	0 min	-	-	-	07/16/2021	-	1 day
W13004-000035	07/09/2021	07/09/2021	07/09/2021	30 min	0 min	07/09/2021	-	-	07/09/2021	07/09/2021	1 day

Download >

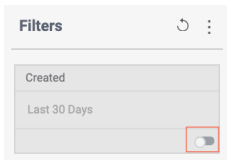
- Image
- CSV File
- PDF File

7. Filter the report using filter categories on the right-hand side of the page.

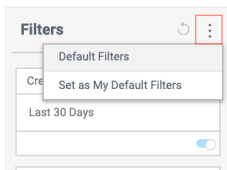
Hover at the top of a filter to click the pen icon and edit the filter.



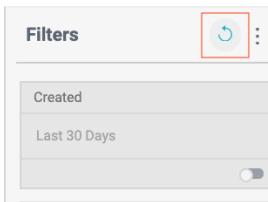
Click the toggle to disable a filter.



Click the three dots at the top of the filters bar to set default filters.

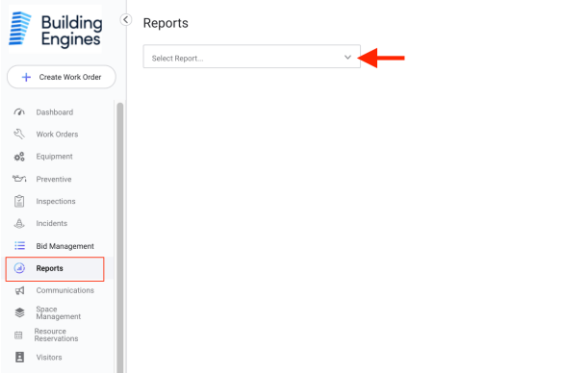


Click the back arrow next to the dots after making any changes to revert to default filter settings.



Labor Allocation Trend Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.



2. Click Labor Allocation Trend Report from the drop down.

3. Click export at the top of the page to download the entire report.

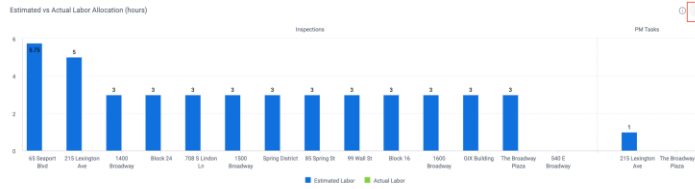


4. Click on areas of the graphs to view specific data.



5. Hover your cursor in the top right corners of the report graphs to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.





6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

Request Type	Request ID	Description	Created From	Created	Completed	Target Completion	Overdue?	Status	Estimated Labor	Actual Labor	Team Assignee
Work Orders	9114810-000001	Blade		07/22/2021	-	07/23/2021	No	New			
Inspections	107179-000103	Unified Inspection Template - 0...		07/23/2021	-	07/23/2021	No	New			
Inspections	107179-000102	Unified Inspection Template - 0...		07/23/2021	-	07/23/2021	No	New			
Inspections	107179-000101	Unified Inspection Template - 0...		07/23/2021	-	07/23/2021	No	New			
PM Tasks	79410088-000004	Area Prep Schedule Demo		07/23/2021	-	07/23/2021	No	New	1 hour(s)		
Work Orders	9113888-001104	Dashboard		07/19/2021	-	08/18/2021	No	New			
Inspections	107179-000108	Unified Inspection Template - 0...		07/19/2021	-	07/23/2021	No	New			
Inspections	107179-000107	Unified Inspection Template - 0...		07/19/2021	-	07/23/2021	No	New	2.00 hour(s)		
Work Orders	9114810-000001	Dashboard		07/19/2021	-	08/20/2021	No	New			
PM Tasks	79410088-000003	Monthly 4th Floor		07/19/2021	-	07/23/2021	No	New			
PM Tasks	79410088-000002	Monthly 4th Floor		07/19/2021	-	07/23/2021	No	New			
Inspections	107179-000106	Unified Inspection Template - 0...		07/19/2021	-	07/19/2021	No	New			
Inspections	107179-000105	Unified Inspection Template - 0...		07/17/2021	-	07/18/2021	No	New			
Inspections	107179-000103	Inspection for Camera Video		07/16/2021	-	07/18/2021	No	New	3 hour(s)		
Inspections	107179-000104	Inspection for Camera Video		07/16/2021	-	07/18/2021	No	New	3 hour(s)		

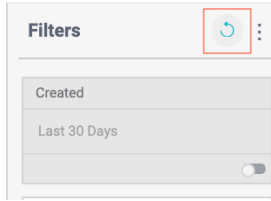
7. Filter the report using filter categories on the right-hand side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.

Click the toggle to disable a filter.

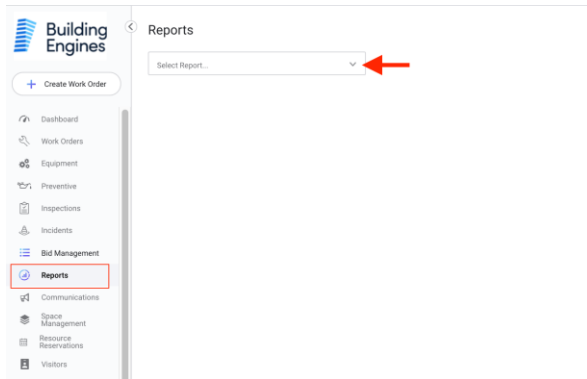
Click the three dots at the top of the filters bar to set default filters.

Click the back arrow next to the dots after making any changes to revert to default filter settings.



Preventative Maintenance Completion Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.

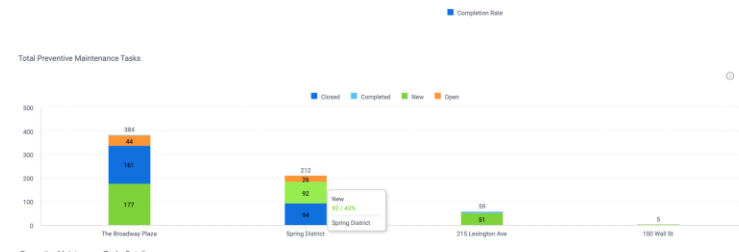


2. Click Preventative Maintenance Completion Report from the drop down.

3. Click export at the top of the page to download the entire report.



4. Click on areas of the bar graph to view specific data.



5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.



6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

Preventive Maintenance Tasks Details

ID#	Task	Status	Equipment Category	Asset Type	Equipment Name	Critical Equipment	Property Name	Property Identifier	Location	Assignee	HA
PH13068-00003	Area Pt.	New	HVAC	Area Prop Asset Type	Area Property Da.	Yes	215 Levington Ave	N/A	Roof	Unassigned	
PH13068-00002	Area Pt.	Closed	Building/Equipment	Demco Asset Type	ACF Demco Equipm.	Yes	215 Levington Ave	N/A	2nd Floor	Robert Commiskey	10
PH13068-00001	Area Pt.	New	HVAC	Area Prop Asset Type	Area Property Da.	Yes	215 Levington Ave	N/A	Roof	Jessica Monroe	20
PH13068-00000	Demco S.	New	Building/Equipment	Body Equip	Demco Equipment	Yes	215 Levington Ave	N/A	Outdoor Seating	Unassigned	
PH13068-00009	Demco S.	New	Building/Equipment	Body Equip	Chair	Yes	215 Levington Ave	N/A	300	Unassigned	
PH13068-00008	Area Pt.	New	HVAC	Area Prop Asset Type	Area Property Da.	Yes	215 Levington Ave	N/A	Roof	Unassigned	
PH13068-00007	Demco S.	New	HVAC	AC Unit - Monthly	AC Unit - Monthly	Yes	215 Levington Ave	N/A	Garment	Robert Commiskey	10
PH13068-00006	Demco S.	New	HVAC	AC	Demco Equipment	Yes	215 Levington Ave	N/A	300A11	Robert Commiskey	10
PH13068-00005	Demco S.	New	HVAC	AC	Demco Equipment	Yes	215 Levington Ave	N/A	300	Robert Commiskey	10
PH13068-00004	Demco S.	New	HVAC	AC	Demco Equipment 2	Yes	215 Levington Ave	N/A	Roof	Robert Commiskey	10

Download

Issue Type

Image

CSV File

PDF File

7. Filter the report using filter categories on the right-hand side of the page.

Hover at the top of a filter to click the pen icon and edit the filter.

Filter Start Date / Edit filter

List

Quarters

Calendar

Time Frame

Property

Location

Equipment Category

Asset Type

Click the toggle to disable a filter.

Filters

Start Date

This Quarter

Click the three dots at the top of the filters bar to set default filters.

Filters

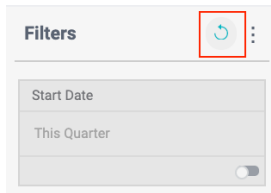
Default Filters

Set as My Default Filters

Start Date

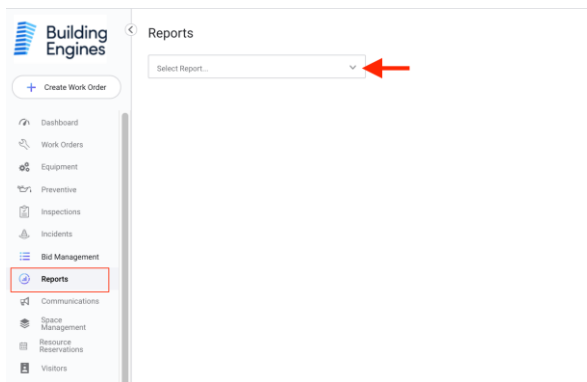
This Quarter

Click the back arrow next to the dots after making any changes to revert to default filter settings.



Equipment Meter Readings Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.

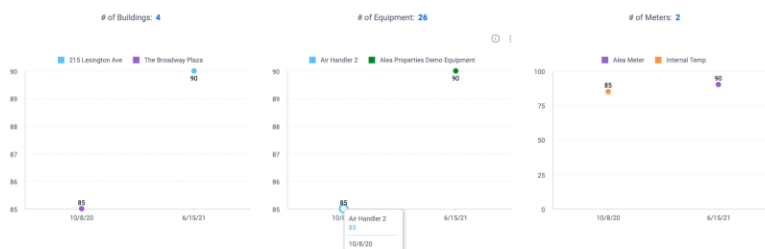


2. Click Equipment Meter Readings Report from the drop down.

3. Click export at the top of the page to download the entire report.



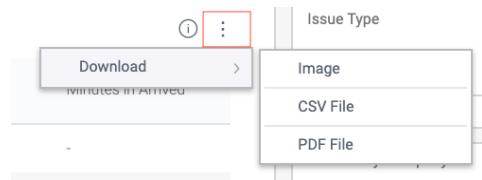
4. Click on areas of the graphs to view specific data.



5. Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

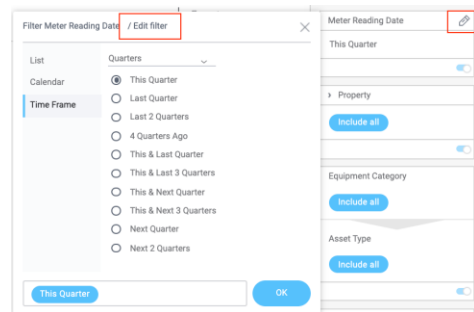


6. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

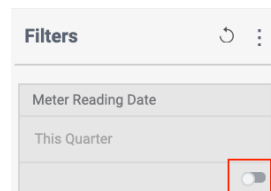


7. Filter the report using filter categories on the right-hand side of the page.

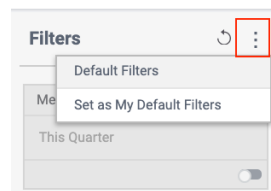
Hover at the top of a filter to click the pen icon and edit the filter.



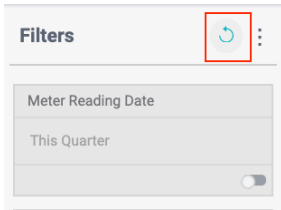
Click the toggle to disable a filter.



Click the three dots at the top of the filters bar to set default filters.

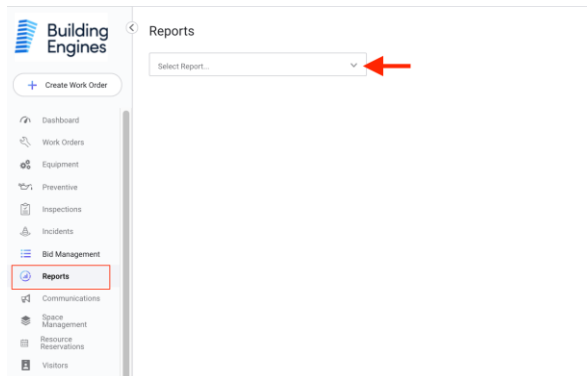


Click the back arrow next to the dots after making any changes to revert to default filter settings.



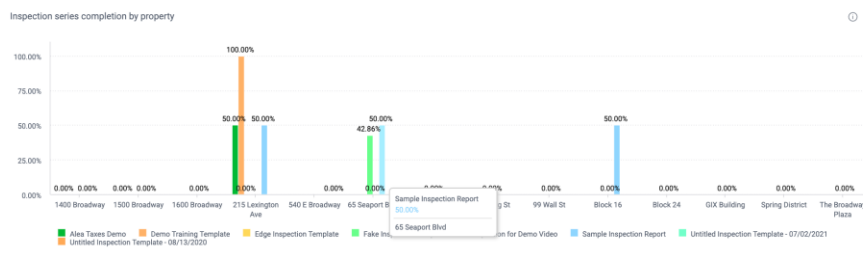
Inspection and Template Report

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.

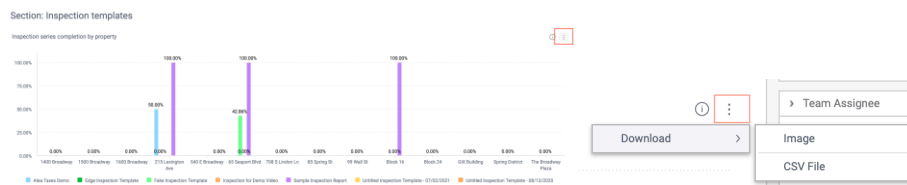


2. Click Inspection and Template Report from the drop down.

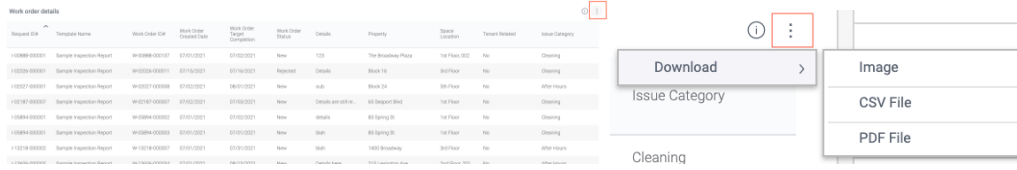
3. Click on areas of the bar graph to view specific data.



4. Hover your cursor in the top right corners of the report graphs to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.

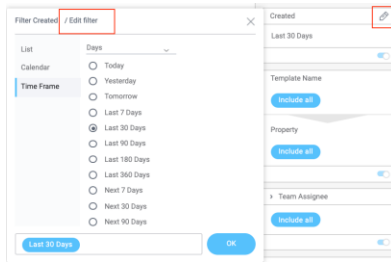


5. Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.

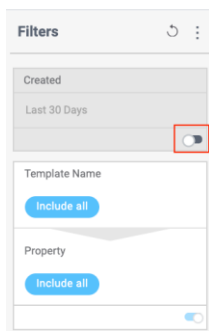


6. Filter the report using filter categories on the right-hand side of the page.

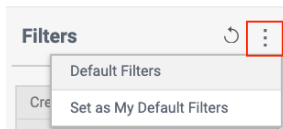
Hover at the top of a filter to click the pen icon and edit the filter.



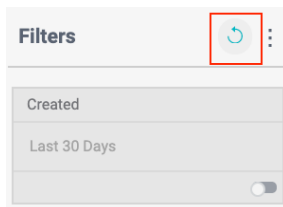
Click the toggle to disable a filter.



Click the three dots at the top of the filters bar to set default filters.

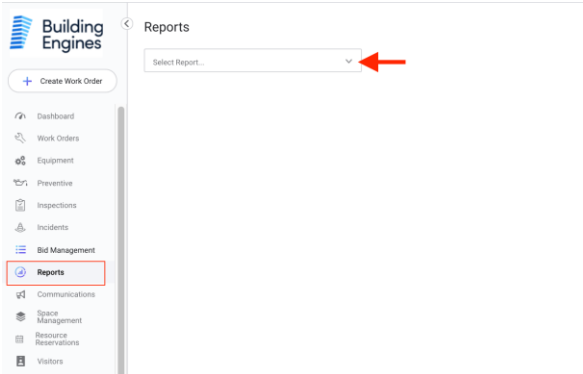


Click the back arrow next to the dots after making any changes to revert to default filter settings.

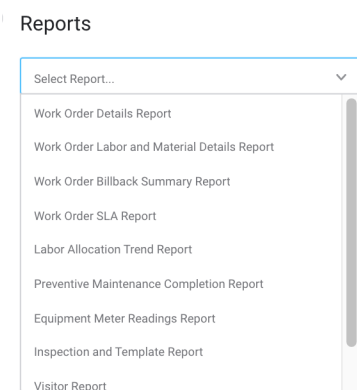


How to Find Reports

1. Click the Reports tab and navigate to the drop down at the top of the page to search for reports.

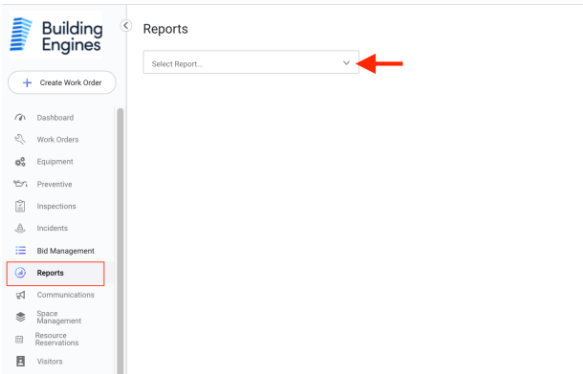


2. Use the drop down to find a report type. Click the report of your choice to open the report page.

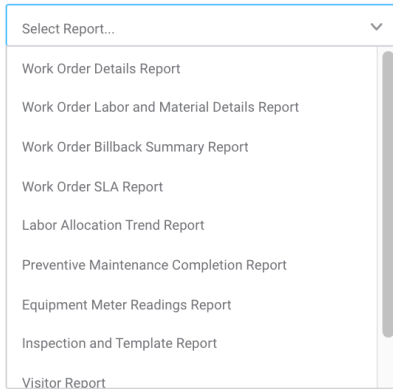


How to Use Reports (filtering)

1. Click the reports tab then use the search to find a report type of your choice. Click into the report.

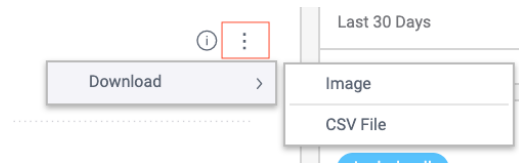


Reports

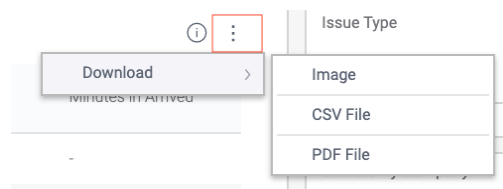


2. Within the reports page you can download the graphs and grids.

Hover your cursor in the top right corner of the report graph to find three dots. Click the dots to open a drop down, then click download to download the graph as an image or CSV file.



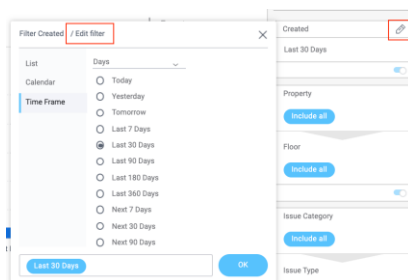
Hover your cursor in the top right corner of the report grid to find three dots. Click the dots to open a drop down, then click download to download the grid as an image, CSV file, or PDF file.



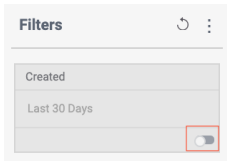
3. Click on areas of the graphs to view specific data.

4. You can filter the report using the filter categories on the right side of the page.

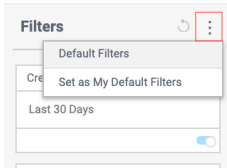
Hover at the top of a filter to click the pen icon and edit the filter.



Click the toggle to disable a filter.



Click the three dots at the top of the filters bar to set default filters.



Click the back arrow next to the dots after making any changes to revert to default filter settings.

