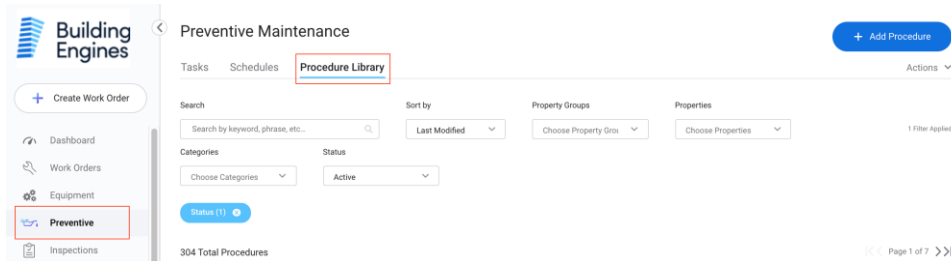


# Preventive

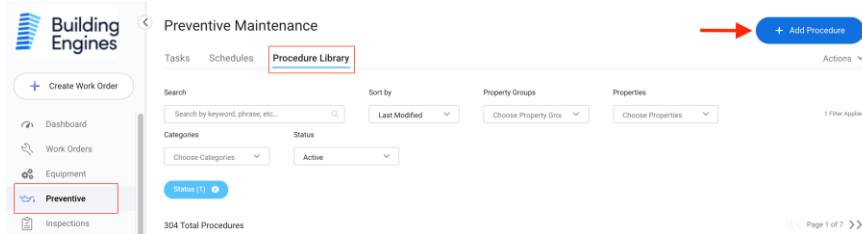
## User Guide

### Adding and Editing Procedures

1. Click the Preventive tab and navigate to the Procedure Library feature.



2. To add a procedure, click the blue Add Procedure button in the top right corner of the page.



3. Enter the name of the new procedure. Choose a property or properties from your account and select a category for the procedure.

A screenshot of the 'Add PM Procedure' form. At the top left, it says 'Draft' and 'All fields required unless marked as optional'. The form has a close button 'X' in the top right. The 'Name' field is highlighted with a red box. Below it are 'Properties' and 'Category' dropdown menus, both with red arrows pointing to them. The 'Properties' dropdown is labeled 'Choose Properties' and the 'Category' dropdown is labeled 'Search...'. There are also optional fields for 'Procedure ID', 'Estimated Labor' (with a 'Hours' label), 'Notes', and 'Parts'. At the bottom, there are 'Steps' and 'Files' sections, and two buttons: 'Save Procedure' and 'Activate Procedure'.

4. You can enter a Procedure ID, estimated labor time in hours, Notes and any parts or materials needed for the task. These are all optional.

5. Click Simple Steps to enter one list of steps to perform the procedure OR Click Individual Steps to add each step to the procedure with the ability to check them off as you complete. Within Individual Steps you can create sections with their own steps

The screenshot shows a form titled "Add PM Procedure" with a "Draft" status and a note "All fields required unless marked as optional". There are two input fields at the top. Below them are tabs for "Steps" and "Files". Under the "Steps" tab, there are two buttons: "Simple Steps" (highlighted with a red arrow) and "Individual Steps". Below these buttons is a large text area with the placeholder text "Enter steps to perform this procedure". At the bottom right of the form are two buttons: "Save Procedure" and "Activate Procedure".

The screenshot shows the same "Add PM Procedure" form. In this view, the "Individual Steps" button is highlighted with a red arrow. Below the "Simple Steps" and "Individual Steps" buttons, there is a text prompt "Add a Section to Get Started" and a button labeled "+ Add Section". The rest of the form, including the "Steps" and "Files" tabs and the "Save Procedure" and "Activate Procedure" buttons, remains the same.

6. To add a file to the procedure, click the Files tab next to Steps then click Add File to upload a file from your device.

## Add PM Procedure

X

Draft ⓘ All fields required unless marked as optional

### Notes (Optional)

Enter additional notes here

### Parts (Optional)

Enter any parts, materials, or tools needed for this task

### Steps

#### Files

+ Add File

Save Procedure

Activate Procedure

### Add File

Upload File Browse Uploads

ⓘ Maximum file size is 25MB.

Upload File

Drop photos or documents to attach, or [browse](#)

Hide from Tenant

Category

Choose Category ▼

Notes (Optional)

Type additional notes or info.

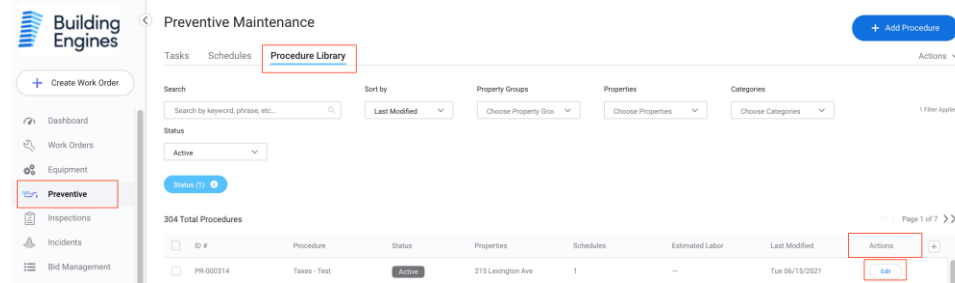
Submit

7. When all fields are complete, you can simply save the procedure without activating it or linking the equipment by clicking the white Save Procedure button at the bottom of the page OR you can save and activate the procedure by clicking the blue Activate Procedure button.

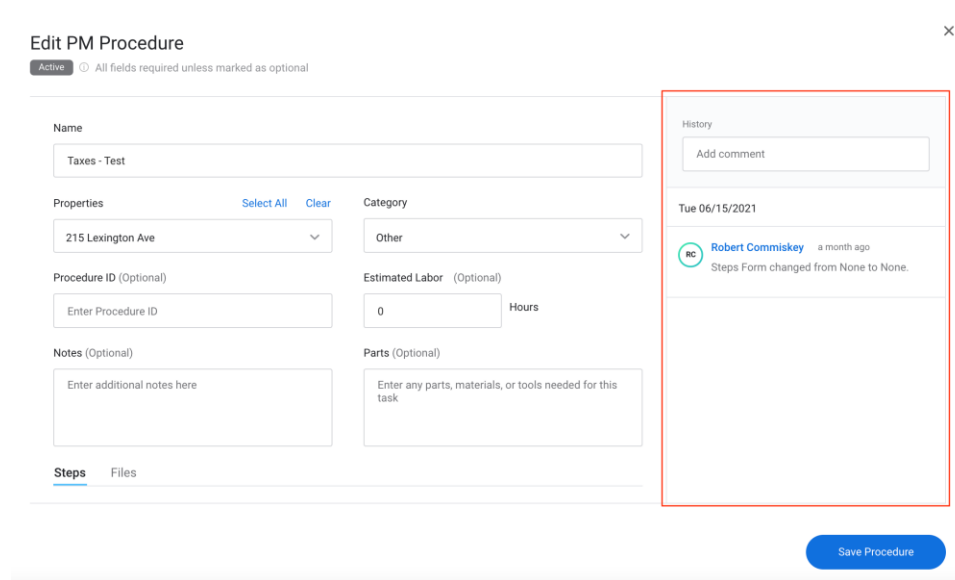
Save Procedure

Activate Procedure

8. To edit a procedure navigate to the Actions tab in the Procedures grid and click Edit on the row of the procedure you wish to edit.



9. View current information for the procedure and change fields like Name, Category, Property etc. On the right of the page, the editing history can be viewed.



10. Edit Individual Steps and Sections by clicking into the box or Add steps and sections by clicking the respective Add buttons within the steps tab. To edit Simple steps, click into the box and enter new information.

## Edit PM Procedure

Active ⓘ All fields required unless marked as optional

Steps Files

Simple Steps Individual Steps ←

Taxes Due

1. Have you completed your taxes for property X?

Done

+ Add Step

+ Add Section

Save Procedure

## Edit PM Procedure

Active ⓘ All fields required unless marked as optional

Steps Files

Simple Steps Individual Steps →

Have you completed your taxes for property X?]

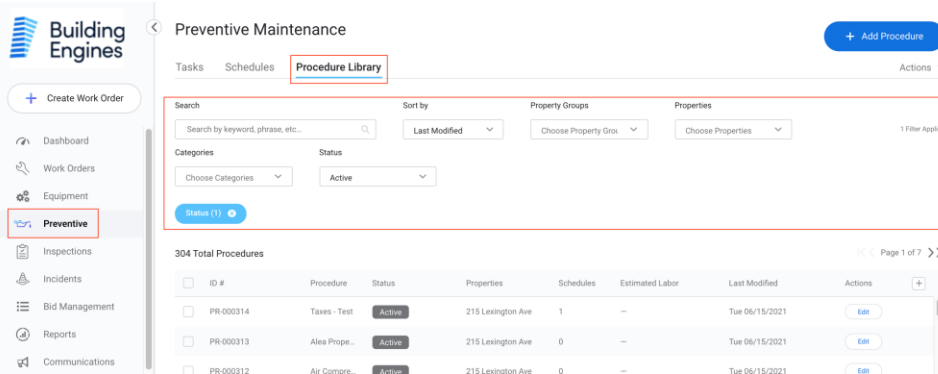
Save Procedure

11. Click the blue Save procedure at the bottom of the page after making any changes.

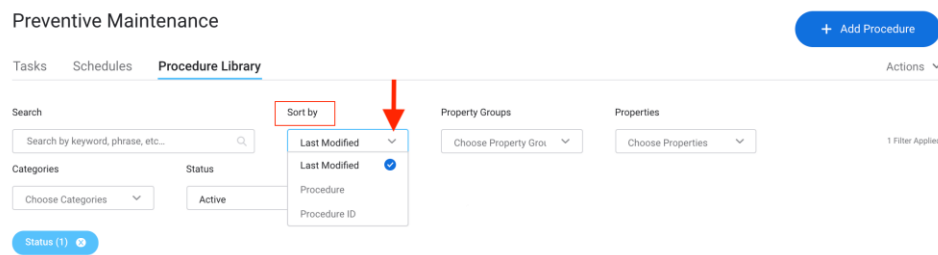
Save Procedure

### Filtering the Procedure Grid

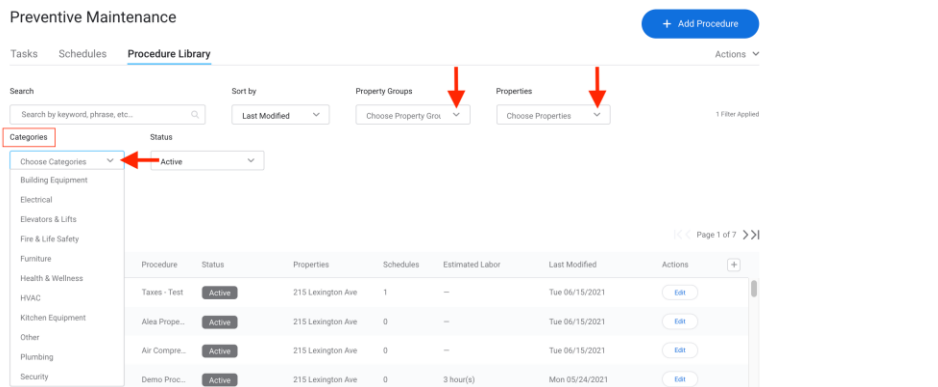
1. Click the Preventive tab and navigate to the Procedure Library feature. Filter the procedure grid using the drop downs at the top of the page.



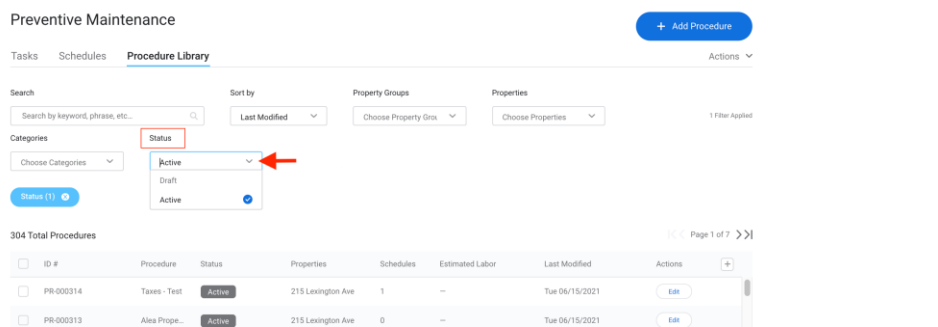
2. Under Sort by filter the grid by Last Modified, Procedure, and Procedure ID.



3. Filter by Property groups, Properties and Categories by clicking the drop downs.



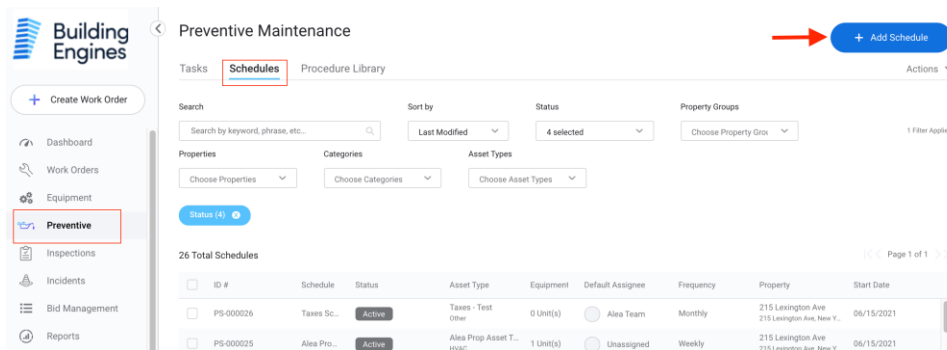
4. Filter by Status



5. View which filters have been applied to the procedure grid in blue under the filters. Clear a filter by clicking the x. If multiple filters have been applied, click the x on each to clear a single filter or click Clear All.

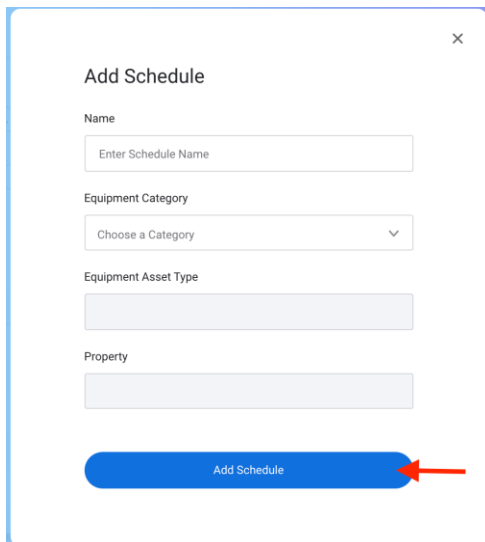
## **Adding and Editing Schedules**

1. Click the Preventive tab and navigate to the Schedules feature
2. To add a schedule, click the blue Add Schedule button in the top right corner of the page.



ID #	Schedule	Status	Asset Type	Equipment	Default Assignee	Frequency	Property	Start Date
PS-00026	Taxes Sc...	Active	Taxes - Test Other	0 Unit(s)	Alia Team	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021
PS-00025	Alia Pro...	Active	Alia Prop Asset T... HVAC	1 Unit(s)	Unassigned	Weekly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021

3. Enter a name for the schedule and select an equipment category, equipment asset type, and a property from the respective drop downs. Click the blue Add Schedule button to continue.



**Add Schedule**

Name  
Enter Schedule Name

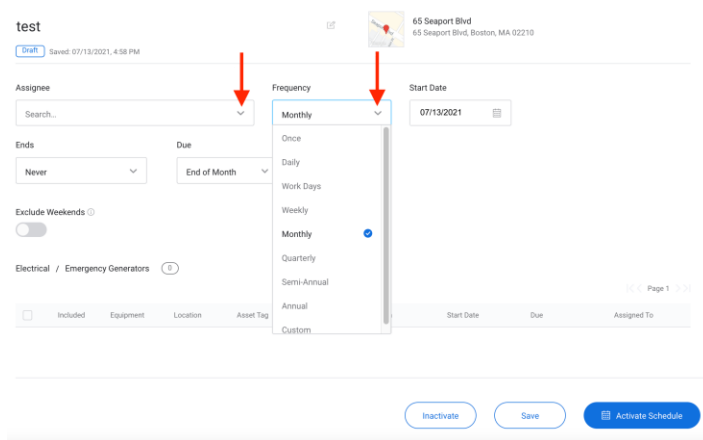
Equipment Category  
Choose a Category

Equipment Asset Type

Property

Add Schedule

4. Select an assignee and frequency for the schedule from the respective drop downs.



5. Enter a start date

6. Under End, select whether you want the schedule to never end, end on a specific date, or end after a certain number of occurrences

7. Select when it is Due. You can choose a custom which will prompt you to enter a number of days for the service.

Ends

Never

Never

On (Specific date)

After (# of occurrences)

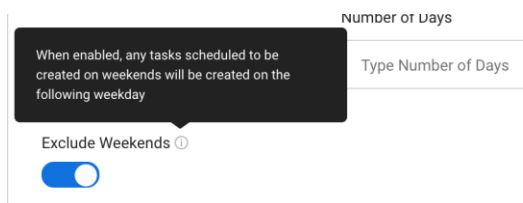
Due

Custom

Number of Days

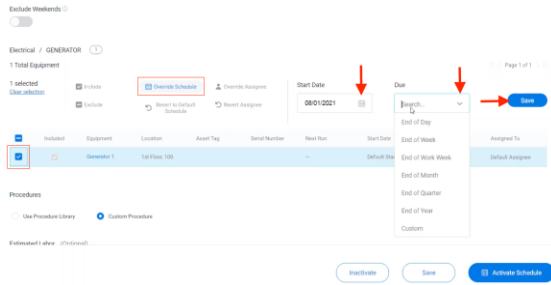
Type Number of Days

8. To Exclude Weekends, click the grey toggle. If the scheduled date falls on a weekend, it will be moved to the following Monday.

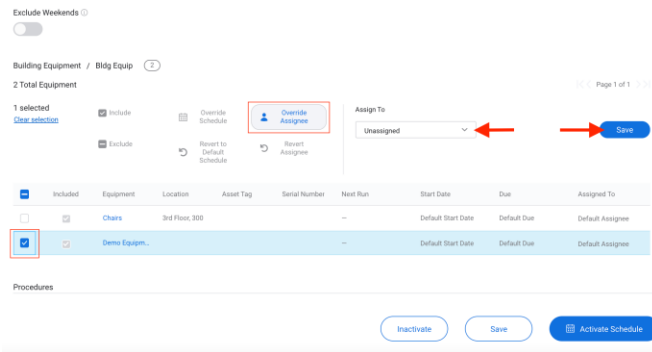


You can override the schedule for a specific piece of equipment by checking the box in front of that equipment on the grid and clicking Override schedule in the above popup. This allows you to change the start date and due by. Click Save when finished.





You can override the assignee for a specific piece of equipment by checking the box in front of that equipment on the grid and clicking Override Assignee in the above popup. Click Save when finished.



9. Click the circle in front of Use Procedure library to select a procedure from your account library. Enter the procedure ID, estimated labor time, any notes, or parts needed for the procedure.

Procedures

Use Procedure Library  Custom Procedure

Procedure Library

Choose From Library

Procedure Id \_\_\_\_\_ Notes \_\_\_\_\_

Estimated Labor \_\_\_\_\_ Parts \_\_\_\_\_

Steps \_\_\_\_\_

OR

Click the circle in front of Custom Procedure to enter a custom set of procedures for the schedule. You can enter estimated labor time, notes and parts.

**Procedures**

Use Procedure Library  Custom Procedure

Estimated Labor (Optional)  
 Hours

Notes (Optional)  
 Enter Text

Parts (Optional)  
 Enter Text

Enter steps to perform this procedure

Click Simple Steps to enter one list of steps to perform the procedure OR Click Individual Steps to add each step to the procedure with the ability to check them off as you complete.

10. When finished, click Save at the bottom of the page to save your changes and keep the schedule in the draft stage, OR click the Activate Schedule button at the bottom of the page to save and set the schedule to begin at your chosen start date.

11. To edit schedules, find a schedule in the schedules grid you would like to make changes to. Scroll to the Actions column on the right of the grid and click View in the row of your chosen schedule.

Preventive Maintenance + Add Schedule

Tasks **Schedules** Procedure Library Actions

Search  Sort by **Last Modified** Status **4 selected** Property Groups  Properties  1 Filter Applied

Categories  Asset Types

**1 selected**

**27 Total Schedules** Page 1 of 1

ID #	Schedule	Status	Asset Type	Equipment	Default Assignee	Frequency	Property	Start Date	Next Run
PS-00027	test	<b>Draft</b>	Emergency Gener- Excutor	0 Unit(s)	Unassigned	Monthly	65 Support Blvd 65 Support Blvd, Boston...	07/13/2021	--
PS-00026	Taxes - Test Filter	<b>Active</b>	Taxes - Test Filter	0 Unit(s)	Alta Team	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021	07/15/2021
PS-00025	Alta Prep...	<b>Active</b>	Alta Prep Asset T... rnc	1 Unit(s)	Unassigned	Weekly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021	07/20/2021
PS-00024	Edge De...	<b>Active</b>	AC rvc	5 Unit(s)	Robert Comm...	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021	01/15/2022
PS-00022	Demo Sc...	<b>Draft</b>	Big Equip Building Equipmen...	2 Unit(s)	Robert Comm...	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	05/11/2021	--
PS-00019	Power Ser...	<b>Active</b>	AC	8 Unit(s)	Robert Comm...	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021	07/15/2021

Preventive Maintenance + Add Schedule

Tasks **Schedules** Procedure Library Actions

Search  Sort by **Last Modified** Status **4 selected** Property Groups  Properties  1 Filter Applied

Categories  Asset Types

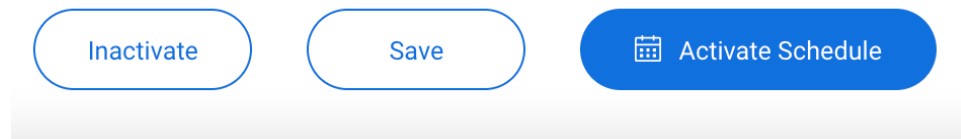
**1 selected**

**27 Total Schedules** Page 1 of 1

Asset Type	Equipment	Default Assignee	Frequency	Property	Start Date	Next Run	Estimated Labor	Actions
Emergency Gener- Excutor	0 Unit(s)	Unassigned	Monthly	65 Support Blvd 65 Support Blvd, Boston...	07/13/2021	--	--	<input type="button" value="View"/>
Taxes - Test Filter	0 Unit(s)	Alta Team	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021	07/15/2021	--	<input type="button" value="View"/>
Alta Prep Asset T... rnc	1 Unit(s)	Unassigned	Weekly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021	07/20/2021	--	<input type="button" value="View"/>
AC rvc	5 Unit(s)	Robert Comm...	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021	01/15/2022	--	<input type="button" value="View"/>
Big Equip Building Equipmen...	2 Unit(s)	Robert Comm...	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	05/11/2021	--	--	<input type="button" value="View"/>
AC	8 Unit(s)	Robert Comm...	Monthly	215 Lexington Ave 215 Lexington Ave, New Y...	06/15/2021	07/15/2021	--	<input type="button" value="View"/>

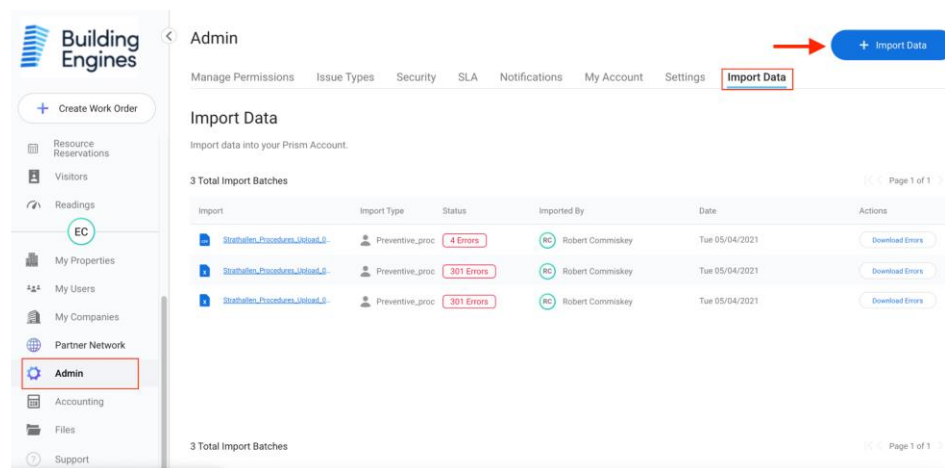
Make any changes to the fields and click the save or activate schedule buttons at the bottom of the page. Save keeps the schedule as a draft, while Activate Schedule sets the schedule to run on its given start date.

Click Inactivate at the bottom of the page to stop running the schedule.



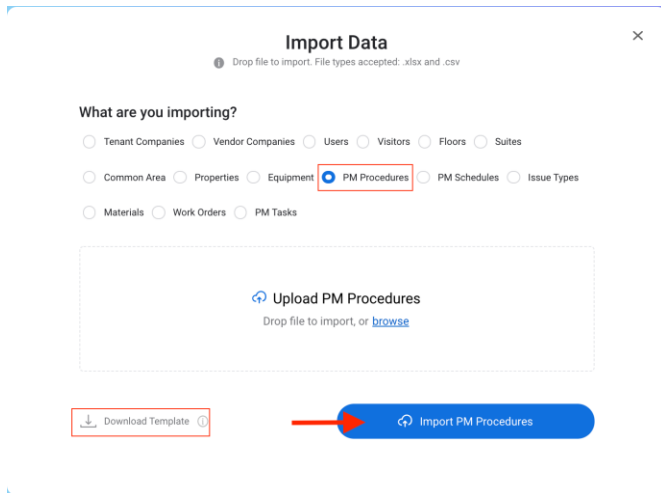
### **Bulk Importing Procedures**

1. Click the Admin tab and navigate to the Import Data feature.
2. Click the blue Import Data button in the top right corner of the page.



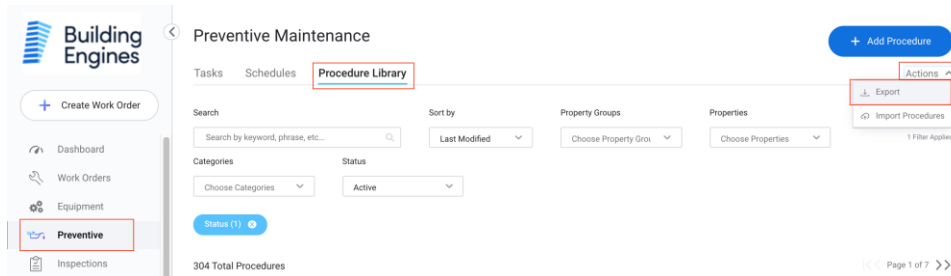
3. Select PM Procedures under “What are you importing?” and click Download Template at the bottom of the page to download a template to enter bulk procedure information. Within the template, columns with an asterisk (\*) must be completed.

4. Upload the complete template from your device then click the Import PM Procedures button at the bottom of the page.



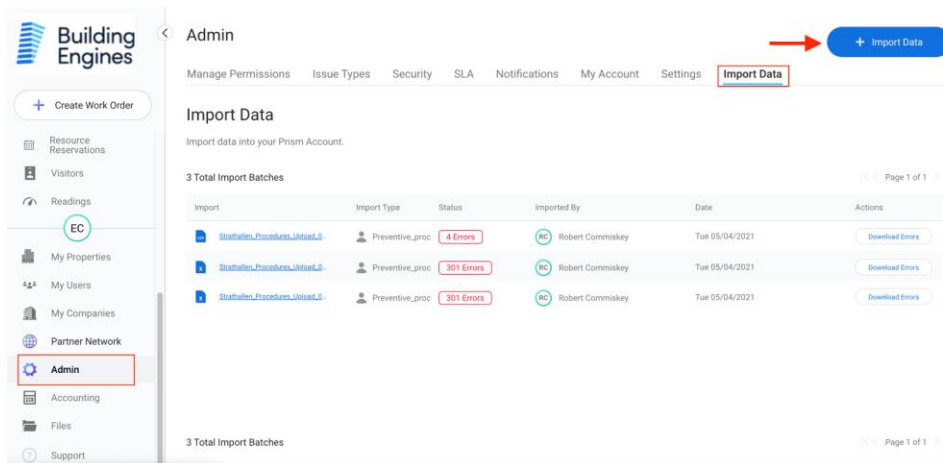
## **Exporting Procedures**

1. Click the Preventive tab and navigate to the Procedure Library feature.
2. Click the Actions tab in the right corner of the page then click Export from the drop down to export the procedures grid.



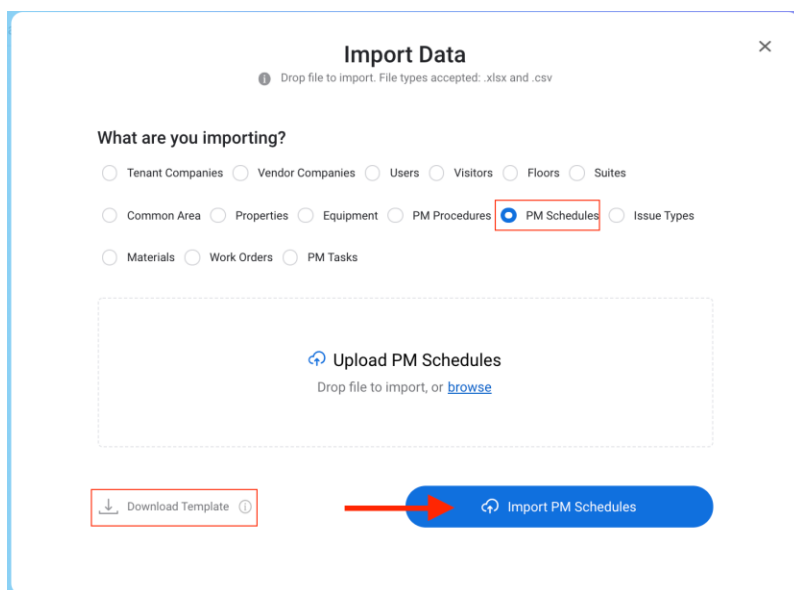
## **Bulk Importing Schedules**

1. Click the Admin tab and navigate to the Import Data feature.
2. Click the blue Import Data button in the top right corner of the page.



3. Select PM Schedules under “What are you importing?” and click Download Template at the bottom of the page to download a template to enter bulk schedule information. Within the template, columns with an asterisk (\*) must be completed.

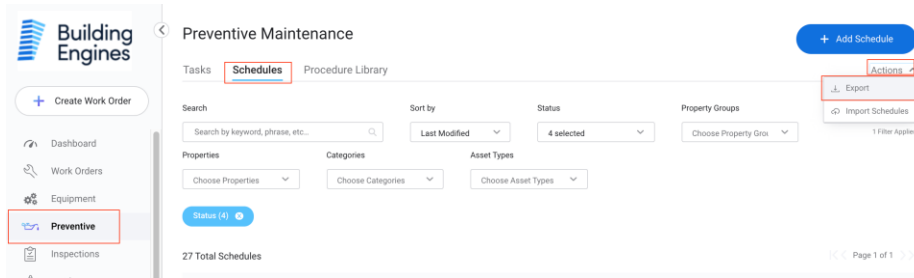
4. Upload the complete template from your device then click the Import PM Schedules button at the bottom of the page.



## Exporting Schedules

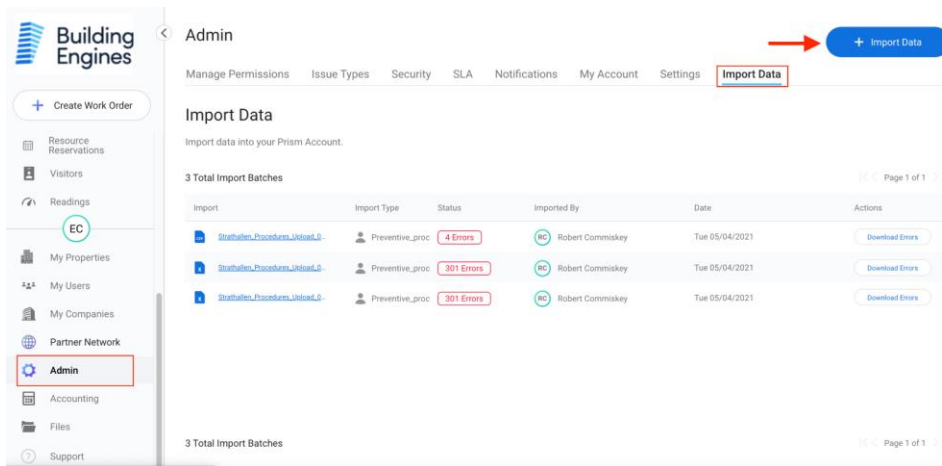
1. Click the Preventive tab and navigate to the Schedules feature.

2. Click the Actions tab in the right corner of the page then click Export from the drop down to export the schedules grid.

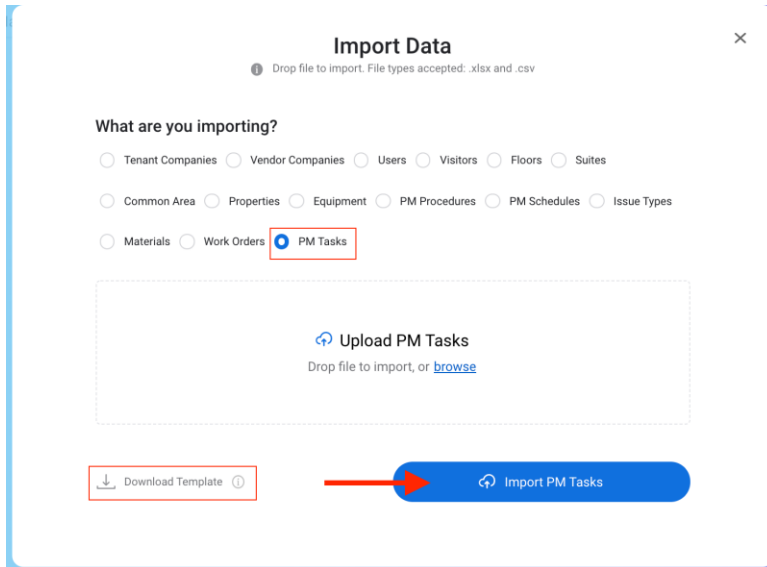


## Bulk Importing PM Tasks

1. Click the Admin tab and navigate to the Import Data feature.
2. Click the blue Import Data button in the top right corner of the page.

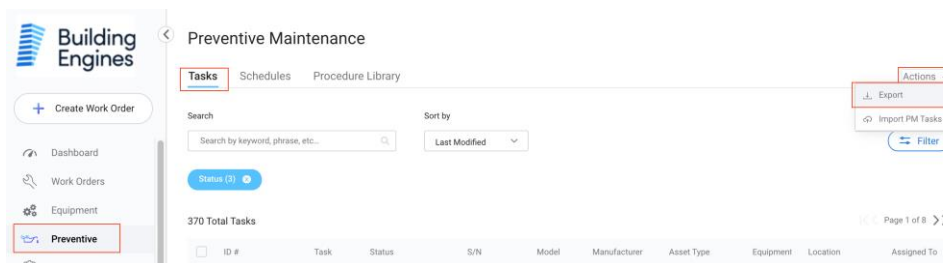


3. Select PM Tasks under “What are you importing?” and click Download Template at the bottom of the page to download a template to enter bulk task information. Within the template, columns with an asterisk (\*) must be completed.
4. Upload the complete template from your device then click the Import PM Tasks button at the bottom of the page.



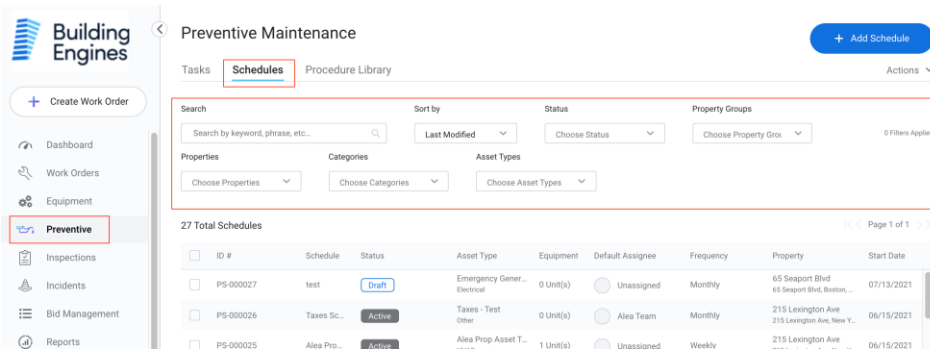
## **Exporting PM Tasks**

1. Click the Preventive tab and navigate to the Tasks feature.
2. Click the Actions tab in the right corner of the page then click Export from the drop down to export the tasks grid.

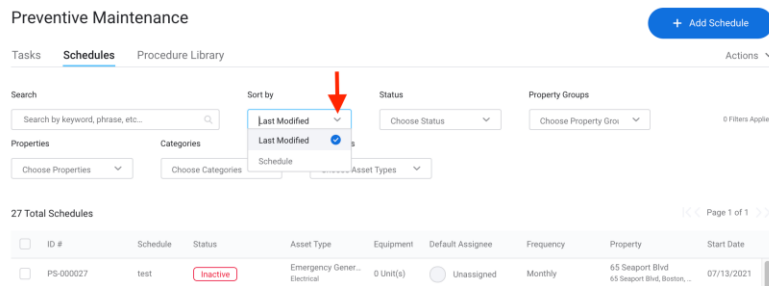


## **Filtering the Schedules Grid**

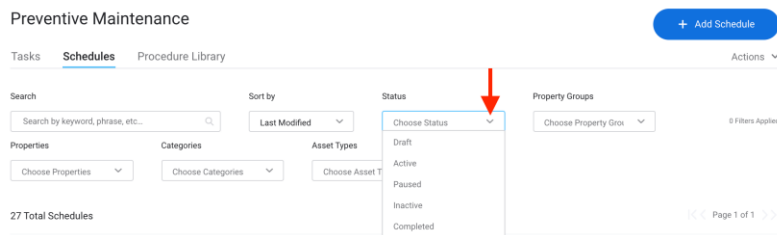
1. Click the Preventive tab and navigate to the Schedules feature. Filter the schedules grid using the drop downs at the top of the page.



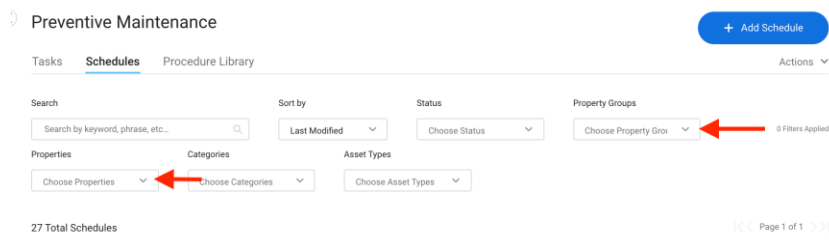
2. Under Sort by, filter the grid by last modified or schedule



3. Filter by Status by clicking the drop down.



4. Filter by property groups and properties from your account.



5. Filter by categories and asset types.



Preventive Maintenance

Tasks Schedules Procedure Library

+ Add Schedule

Search: Search by keyword, phrase, etc... Sort by: Last Modified Status: Choose Status Property Groups: Choose Property Gro... 0 Filters Applied

Properties: Choose Properties Categories: Choose Categories Asset Types: Choose Asset Types

27 Total Schedules

ID #	Sched	Equipment	Default Assignee	Frequency	Property	Start Date
PS-000027	test	Emergency Gener... Electrical	Unassigned	Monthly	65 Seaport Blvd, Boston...	07/13/2021
PS-000026	Taxes	Taxes - Test Other	Alea Team	Monthly	215 Lexington Ave, New Y...	06/15/2021
PS-000025	Alea P	Alea Prop Asset T... HVAC	Unassigned	Weekly	215 Lexington Ave, New Y...	06/15/2021
PS-000024	Edge C	AC HVAC	Robert Comm...	Monthly	215 Lexington Ave, New Y...	06/15/2021
PS-000022	Demo	Bldg Equip Building Equipment	Robert Comm...	Monthly	215 Lexington Ave, New Y...	05/11/2021

6. View which filters have been applied to the schedules grid under the filters. Clear a filter by clicking the x. If multiple filters have been applied, click the x on each to clear a single filter or click Clear All.

Preventive Maintenance

Tasks Schedules Procedure Library

+ Add Schedule

Search: Search by keyword, phrase, etc... Sort by: Last Modified Status: Active Property Groups: Choose Property Gro... 3 Filters Applied

Properties: Choose Properties Categories: Building Equipment Asset Types: Choose Asset Types

Status (1) Categories (1) Clear All

1 Total Schedules

ID #	Schedule	Status	Asset Type	Equipment	Default Assignee	Frequency	Property	Start Date
PS-000021	Demo Sc...	Active	Bldg Equip Building Equipment	2 Unit(s)	Unassigned	Monthly	215 Lexington Ave, New Y...	05/07/2021

## Filtering the PM Tasks Grid

1. Click the Preventive tab and navigate to the Tasks feature. Click the Filter button on the right side of the page to option the filter categories.

Building Engines

Preventive Maintenance

Tasks Schedules Procedure Library

+ Create Work Order

Dashboard Work Orders Equipment Preventive Inspections

Search: Search by keyword, phrase, etc... Sort by: Last Modified Filter

Status (1)

370 Total Tasks

ID #	Task	Status	S/N	Model	Manufacturer	Asset Type	Equipment	Location	Assigned To
------	------	--------	-----	-------	--------------	------------	-----------	----------	-------------

2. Click the drop downs to sort by last modified, task, or due date.

3. Filter by property groups and properties from your account.

## Preventive Maintenance

Tasks Schedules Procedure Library Actions

Search  
Search by keyword, phrase, etc...

Status  
3 selected

Created  
MM/DD/YYYY to MM/DD/YYYY

Sort by  
Last Modified

Property Groups  
Choose Property Gro

Properties  
Choose Properties

Asset Types  
Choose Asset Types

Overdue  
Is Overdue?

Status (3)

4. Filter by status, assignee, categories or asset types by clicking the respective drop downs.

## Preventive Maintenance

Tasks Schedules Procedure Library Actions

Search  
Search by keyword, phrase, etc...

Status  
3 selected

Created  
MM/DD/YYYY to MM/DD/YYYY

Sort by  
Last Modified

Property Groups  
Choose Property Gro

Properties  
Choose Properties

Asset Types  
Choose Asset Types

Overdue  
Is Overdue?

Target Completion  
MM/DD/YYYY to MM/DD/YYYY

Assigned To  
Choose Assignee

Categories  
Choose Categories

Is Overdue?

Page 1 of 8

ID #	Task	Status	S/N	Model	Manufacturer	Asset Type	Equipment	Location	Assigned To
------	------	--------	-----	-------	--------------	------------	-----------	----------	-------------

5. Filter by date created, target completions, or overdue status.

6. View which filters have been applied to the tasks grid under the filters. Clear a filter by clicking the x. If multiple filters have been applied, click the x on each to clear a single filter or click Clear All.

## Preventive Maintenance

Tasks Schedules Procedure Library Actions

Search  
Search by keyword, phrase, etc...

Status  
3 selected

Created  
MM/DD/YYYY to MM/DD/YYYY

Sort by  
Last Modified

Property Groups  
Choose Property Gro

Properties  
Choose Properties

Asset Types  
Choose Asset Types

Overdue  
Is Overdue?

Target Completion  
MM/DD/YYYY to MM/DD/YYYY

Assigned To  
Choose Assignee

Categories  
Electrical

Clear All

118 Total Tasks

Page 1 of 3

## Pausing and Inactivating Schedules

1. Click the Preventive tab and navigate to the schedules feature.
2. Find an active schedule you would like to change and click the View button under the Actions column in the grid.

Building Engines Preventive Maintenance

Tasks **Schedules** Procedure Library

+ Add Schedule

Search: Search by keyword, phrase, etc... Sort by: Last Modified Status: 4 selected Property Groups: Choose Property Grp Properties: Choose Properties Categories: Choose Categories 1 filter Applied

Asset Types: Choose Asset Types

Status (4)

26 Total Schedules

ID #	Schedule	Status	Asset Type	Equipment	Default Assignee	Frequency	Property	Start Date	Next Run	Estimated Labor	Actions
PS-00026	Taxes Sc...	Active	Taxes - Test Other	0 Unit(s)	Alea Team	Monthly	215 Lexington Ave, 215 Lexington Ave, New Y...	06/15/2021	07/15/2021	--	View
PS-00023	Alea Ph...	Active	Alea Prop Asset T... wAC	1 Unit(s)	Unassigned	Weekly	215 Lexington Ave, 215 Lexington Ave, New Y...	06/15/2021	07/20/2021	--	View
PS-00024	Edge Dr...	Active	AC wAC	5 Unit(s)	Robert Comm...	Monthly	215 Lexington Ave, 215 Lexington Ave, New Y...	06/15/2021	01/15/2022	--	View

3. Click the Pause or Inactivate button at the bottom of the page.

Taxes Schedule - Test

Active Saved: 06/15/2021, 10:33 AM

215 Lexington Ave  
215 Lexington Ave, New York, NY 10016

Assignee: Alea Team Frequency: Monthly Start Date: 06/15/2021

Ends: Never Due: End of Month

Exclude Weekends:

Other / Taxes - Test

Page 1

Included	Equipment	Location	Asset Tag	Serial Number	Next Run	Start Date	Due	Assigned To
----------	-----------	----------	-----------	---------------	----------	------------	-----	-------------

Inactivate Pause Save