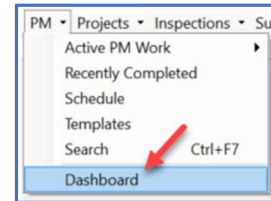


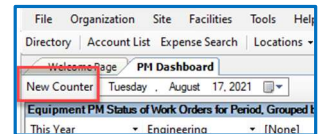
PM Dashboards - Overview

PM dashboards are designed to give you real-time information around the status of PM completion rates. Use PM dashboards to schedule work in a timely manner and manage staffing levels. If you have any questions about PM dashboards, please contact training@katanasoft.com.

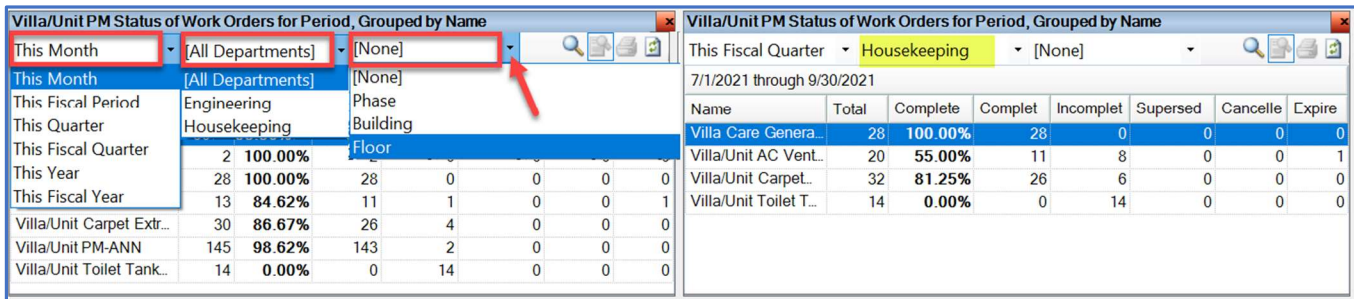
Step 1: Open the PM Dashboard by using the drop down from the PM menu tab.



Your pre-loaded PM counters will open automatically when you open the PM dashboard screen. To add additional counters, use the New Counters button and select the counters of your choice.

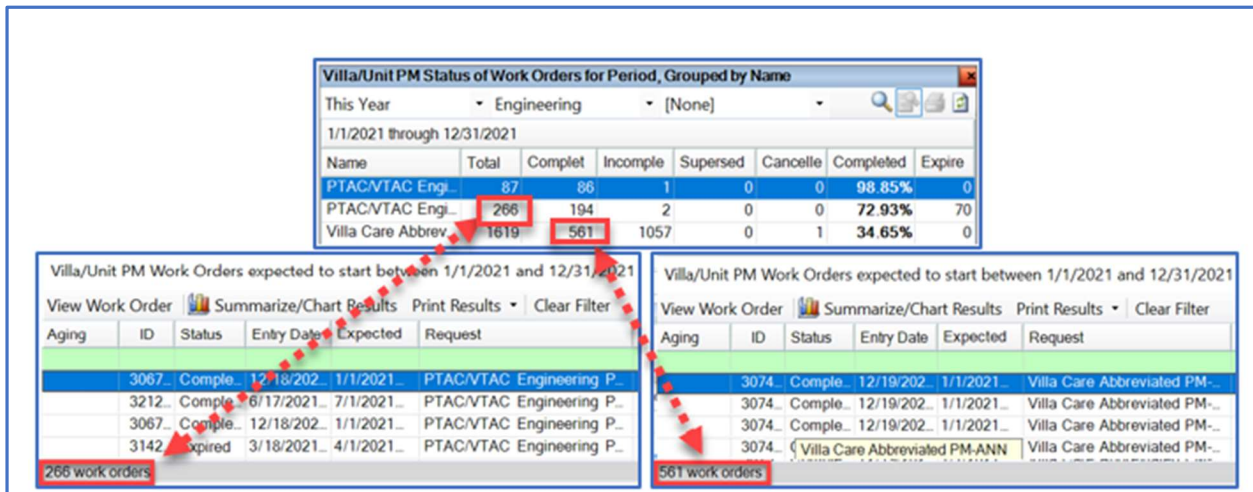


Step 2: Once your counter(s) open up, you can filter the data by **Time Period, Department, and/or Location** by using the dropdown arrow next to each data point.



Name	Total	Complete	Complet	Incomplet	Supersed	Cancell	Expire
Villa Care Genera...	28	100.00%	28	0	0	0	0
Villa/Unit AC Vent...	20	55.00%	11	8	0	0	1
Villa/Unit Carpet...	32	81.25%	26	6	0	0	0
Villa/Unit Toilet T...	14	0.00%	0	14	0	0	0

Step 3: Double click any number in any column to see the actual work orders.



Name	Total	Comple	Incomple	Supersed	Cancell	Completed	Expire
PTAC/VTAC Engi...	87	86	1	0	0	98.85%	0
PTAC/VTAC Engi...	266	194	2	0	0	72.93%	70
Villa Care Abbrev...	1619	561	1057	0	1	34.65%	0

Aging	ID	Status	Entry Date	Expected	Request
	3067...	Comple...	12/18/202...	1/1/2021...	PTAC/VTAC Engineering P...
	3212...	Comple...	6/17/2021...	7/1/2021...	PTAC/VTAC Engineering P...
	3067...	Comple...	12/18/202...	1/1/2021...	PTAC/VTAC Engineering P...
	3142...	Expired	3/18/2021...	4/1/2021...	PTAC/VTAC Engineering P...

Aging	ID	Status	Entry Date	Expected	Request
	3074...	Comple...	12/19/202...	1/1/2021...	Villa Care Abbreviated PM...
	3074...	Comple...	12/19/202...	1/1/2021...	Villa Care Abbreviated PM...
	3074...	Comple...	12/19/202...	1/1/2021...	Villa Care Abbreviated PM...
	3074...	Villa Care Abbreviated PM-ANN			Villa Care Abbreviated PM...



To print data compiled on a grid, right click and click Export to Excel.

Name	Total	Complete	Complet	Incomplet	Supersede	Cancele	Expired
A/C Filter Replac...	90	95.56%	86	4	0	0	0
Spring/Fall Preve...	2	100.00%	2	0	0	0	0
Villa/Unit PM-ANN	145	98.62%	143	2	0	0	0

Step 4: Useful tools on the upper right-hand corner of the counter:

- (1) To magnify dashboard, click the magnifying glass icon.
- (2) To switch the view from a graph to a matrix format, click the Toggle Grid View icon.
- (3) To print a single counter, click the printer icon.
- (4) To refresh data, use the refresh icon.



Step 5: To print the full dashboard screen, click the Print button in the upper right-hand corner.

Dashboard

Villa/Unit PM Aging Status for work starting in period of specified status

Villa/Unit PM Status of Work Orders for Period, Grouped by Name

Villa/Unit PM Aging Status for work starting in period of specified status

OK 69.70% Overdue 9.24%

OK 73.30% Due 19.32% Overdue 7.39%

OK: 129

Step 6: Hover over any graph to see the number of work orders associated with each data point.

