

PROPERTY PRO 2000

...ISO Professional Property Maintenance System

USER'S GUIDE



...Residential Property Management



...Condominiums



...Resorts



...Schools



...Office Buildings



...Hotels



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PROPERTY PRO 2000

The PROPERTY PRO 2000 ISO Professional Maintenance Management System is a full feature program that is designed to provide small and large manufacturers with the ability to thoroughly define and monitor the maintenance function, provide preventive maintenance and efficiently manage the plant maintenance function. The system also provides valuable management information to analyze and evaluate the effectiveness of the various functions, including the tracking and reporting of labor, material and subcontracting costs. A full featured inventory and purchasing system is included with the maintenance program.

The PROPERTY PRO 2000 ISO9000 Professional Maintenance Management System is designed for any version of Windows, including Windows ME, XP, 2000 and Windows NT.

A unique feature of the program allows use of the full features of the program for demonstration purposes (quantity of new data entry is limited, but sufficient for the user to fully evaluate the capabilities of the program). Company data entered during the demonstration period is not lost when the system is fully activated. Activation simply involves the entry of a code by the user to indicate the purchase of selected modules.

The system is provided with sample data to illustrate the functions of the various windows. It is strongly suggested that the user access each module and fully understand the function of each window and control to become thoroughly familiar with all the features before beginning the entry of active company records.

ABOUT THIS MANUAL

The PROPERTY PRO 2000 manual is provided to introduce the user to the extensive capabilities and features of the PROPERTY PRO 2000 modules. The manual is purposely brief and simple to follow so that the user will quickly be able to access and use the program. A detailed on line manual is provided through the Help selections at each window by pressing the "Help" button.

HARDWARE REQUIREMENTS

PROPERTY PRO 2000 can be installed on IBM 386, 486, or Pentium true compatibles with at least 640K of RAM memory. For best performance a 486 or Pentium computer running at a minimum of 33 MHz should be used. PROPERTY PRO 2000 needs most of the 640K of RAM so other memory resident (TSR's) software should be held to a minimum. The complete program requires up to 12 megabytes of hard disk space for all the options. More disk space will be required as data is added. The program is fully network ready and will run on any Windows version including ME, XP, NT and 2000.

INSTALLATION

PROPERTY PRO 2000 is supplied on a CD with all the programs and the User's Guide. The disk will self start when inserted in the drive (or select the CD drive and then Install.exe from explorer). Select the Property/Building Maintenance button, then the Install PROPERTY PRO 2000 Maintenance System button.

The installation program will create new directories automatically in the drive and directory name the user specifies when prompted. The default directory is C:\PROP.

To install on a network server map the PROP folder to a DOS drive (such as J:/PROP. Then create shortcuts on each workstation with the target J:/PROP/Prop2000.exe.

STARTING PROGRAM

During the installation process a program group named PROPERTY PRO 2000 was created. To start PROPERTY PRO 2000 double click on the PROPERTY PRO 2000 icon. The program may also be started by double

clicking on C:\Prop2000\Prop2000.EXE (or the directory name specified by the user).



SECURITY

A security system is incorporated in PROPERTY PRO 2000 to provide limited access of the individual programs and data so that only duly authorized personnel can view or change data. Each employee of the company is identified by name and each is issued a unique password. In addition, the modules that the employee is permitted access are designated. Five levels of security are provided to limit the activity of the employee in that module.

- Level 1- System Administrator
 - Enters security passwords
- Level 2- Personnel
 - Access to employee records and labor rates
- Level 3- Manager
 - Access to all other records, data and management reports
- Level 4- Operator
 - Access to all other records and data.
- Level 5- Review
 - Can only view summary records, cannot change data.

Only employees with security Level 1 have access to the security portion of the system. To access the security setting, select "SUPPORT" from the main menu of the PROPERTY PRO 2000. Then select "EMPLOYEES".

The employee designated as the system administrator (by setting the security level for that employee to 1) should enter the security level and password for each employee. **Note that only the employee(s) with Level 1 security will have access to this screen. Be sure the at least one employee has the Level 1 designation before deleting the "DEMO" employee from the employee list.** The PROPERTY PRO 2000 system is shipped with an employee named "DEMO" with the password "DEMO" and security level 1 so there is initial access to the security screen.

PROGRAM STRUCTURE

HELP SCREENS

Each of the modules is supported by extensive on line help that is accessible at every window. Help may be accessed from either the help contents selection from window menus or by selecting the "Help" button on each window.

SAMPLE DATA

PROPERTY PRO 2000 is supplied with sample data simulating a manufacturing business. The data is automatically provided during the installation process. It is strongly recommended that this data be left on the system until the user becomes thoroughly familiar with all the features of the program. While becoming familiar with the program this sample data may be modified, or additional data may be entered. For each new window it is suggested the user read the help associated with the window. Follow the instructions for adding, modifying or deleting data and records.

After becoming familiar with the features of PROPERTY PRO 2000 the sample data may be removed individually from the appropriate windows using the delete method provided for that window.

STRUCTURE

The PROPERTY PRO 2000 modules are designed to be extremely simple to use and to provide the maximum amount of information using very few windows. For example the "Maintenance" and then the "Property" selection of the menu will immediately provide the user with detailed data about the property that is selected as well as the maintenance history about the selected property items without changing windows! Buttons are provided so that complete detailed data about either the property itself or the maintenance records can be easily retrieved.

All programs are constructed using several basic window types: Menus, Scrolling Tables, Data Entry windows, and Reports

Menus: Selection of area of interest.

Scrolling Tables: a list of available records.

Data Entry window: Individual detail data about a selected record.

Reports: Print out of information.

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data. When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

Tables:

[PgDn] scrolls the table to the next page of data.

[PgUp] scrolls the data to the previous page of data.

[Ctrl-PgDn] scrolls the table to the last page of data.

[Ctrl-PgUp] scrolls the table to the first page of data.

Forms:

[Tab] accepts the data entry for the highlighted field and advances the highlighted cursor to the next field. When the last field is accepted all the data is saved for the record and control returns to the table window.

Select "OK" button to accept all the data from any window.

Within a highlighted field move the cursor to the desired location using the mouse or the left and right arrow keys. Characters may be deleted with the [Delete] or [Backspace] keys.

TECHNICAL SUPPORT

Unlimited technical support for PROPERTY PRO 2000 is provided at no charge. Before contacting technical support make use of the Help functions that are available at each PROPERTY PRO 2000 window. Contact BDR Systems customer service at 610-873-8570 or e-mail at address info@bdrsystems.com (be certain to type the address exactly as shown, do not use capital letters).

PROPERTY PRO 2000

The PROPERTY PRO 2000 Professional Maintenance System is comprised of seven major sections: Support, Maintenance, Maintenance Request, Inventory, Purchasing, System and Reports. The integrated system is designed to track every property that require emergency or unscheduled maintenance as well a regular preventive maintenance. The documentation of preventive and unscheduled maintenance data is specifically designed to provide record retention and traceability to assist in achieving the requirements of ISO9000. The system also provides valuable management information to analyze and evaluate the effectiveness of the maintenance program, the cost of building and property maintenance and repair, and the status of all properties for any period. A full featured inventory and purchasing system is included in the program.

Major features include:

- Property Details
- Unlimited maintenance items for each property
- Maintenance intervals by days or meter/miles.
- Maintenance Request System
- Purchasing order generation
- Work Order system
- Monitors PM and Unscheduled Maintenance
 - Labor Costs tracked
 - Material Costs tracked
 - Subcontracting costs tracked
- Inventory System
- Labor Scheduling
- Management Analysis
- Tenant Management

The system is provided with sample data to illustrate the functions of the various windows. It is strongly suggested that the user access and fully understand the function of each window and control to become thoroughly familiar with all the features before beginning the entry of active company records.

MAINTENANCE

The main menu of PROPERTY PRO 2000 has a drop down menu choice tool bar and an icon selection tool bar to rapidly access the frequently used sections of the program Select the MAINTENANCE menu selection in the PROPERTY PRO 2000 main menu.



Selecting the drop down menu items (File, Edit, Support, Maintenance etc.) will produce sub menus with selections. Click on each with the left mouse button to see the vast selection available.

Selections may be made from either tool bar. Try each to become familiar with the choices.

To rapidly access data on screens with tab controls and lists of data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Mfg:" below). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

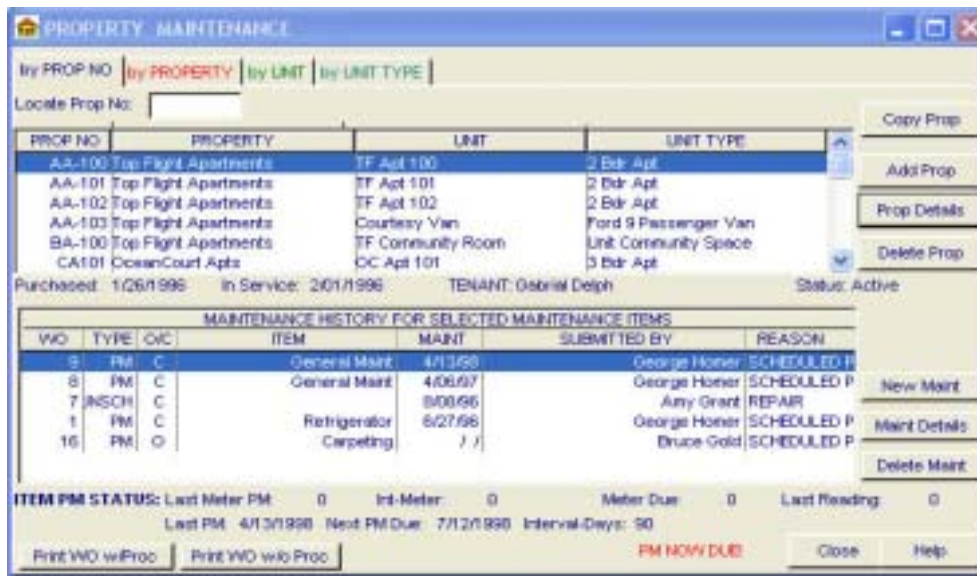
To become familiar with the features and structure of the program the following tour of the program is recommended.

Every maintenance action, whether preventive maintenance or unscheduled maintenance, begins with using the Maintenance selection from the main menu (or the Prop/Maint icon). A sub menu provides selection of Enter Meter Readings, Open Maint Requests, Closed Maint Requests, Equipment, Procedures, PM Due, Work Order Status or Open Work Orders.

The selections:

- Enter Current Meter Readings: Update meter or mileage readings.
- Open Maint Requests: Requests that have not been converted to work orders.
- Closed Maint Requests: Requests that have been deleted or work orders issued.
- Property: Complete access to all property detail and maintenance history.
- Procedures: Detailed PM procedures for selected property.
- PM Due: A table listing of all properties requiring PM during selected period.
- Work Order Status: A table listing of all work orders with pertinent data.
- Open Work Orders: Current open work orders.

Select the Property item from the Maintenance menu (or select the Prop/Maint icon).



The window is divided into an upper and lower section. The upper section contains a scrolling table with a listing of all properties that have been entered into the system. The lower section contains a scrolling table with all the maintenance records for the property that is highlighted in the upper screen. Between the upper and lower tables is additional detailed data for the property that is highlighted. Use the up and down arrows, selected with the mouse, to scan through the records. Note how the maintenance records and detailed data changes for each change in highlighted property.

PROPERTY

The property section contains all the properties that are included in the maintenance system. Each property is assigned a unique alphanumeric property identification number by the user whenever a new property record is added to the maintenance system. For each property an unlimited quantity of maintenance items may be entered.

PROPERTY PRO 2000 is structured so that vital information regarding both property detail data and maintenance data is available on a single screen.

The “Maintenance”, then “Property” selection from the menu, or by selecting the Prop/Maint icon will immediately provide the user with detailed data about the property that is selected as well as the maintenance history about the selected property- without changing windows! Buttons are provided so that complete detailed data about either the property itself or the maintenance records can be easily retrieved.

The window is divided into an upper and lower section. The upper section contains a scrolling table with a listing of all properties that have been entered into the system. The lower section contains a scrolling table with all the maintenance records for the property that is highlighted in the upper screen. Between the upper and lower tables is additional property detailed data for the property that is highlighted. Use the up and down arrows, selected with the mouse, to scan through the property records. Note how the maintenance records and detailed property data changes for each change in highlighted property.

Below the lower maintenance record scrolling table is the PM maintenance status for the highlighted maintenance item for the selected property. If the item is past due for maintenance it is indicated in the lower right section of the window.

The property data may be sorted and viewed by property number, Building/Unit, or property description. Place the mouse cursor on the tab above the upper table and click the left mouse button to select the preferred sort.

To the right of the property table are buttons to add, view detail, or delete property records. Place the mouse cursor on the "Property Details" button and click with the left mouse button.

PROPERTY MAINTENANCE ITEMS

One of the most powerful features of the PROPERTY PRO 2000 maintenance management system is the ability to schedule and track preventive and unscheduled maintenance for multiple items for the same property. Example: The facility roof top HVAC unit requires belt inspection every 3 months (one item), refrigerant pressure check every 150 usage hours (2nd maintenance item), safety and electrical inspection every 6 months (3rd maintenance item), complete overhaul every year (4th maintenance item) etc. An unlimited number of maintenance items may be associated with each property item.

Select the "Preventive Maint" tab to add or view the maintenance items associated with the selected property. Each maintenance item is independent and may have a time period or meter/milage preventive maintenance interval. Select the appropriate tab to view the general data, financial information, nameplate specifications, Spare Parts listing and Comments concerning this property. All the data relative to the selected property is displayed in one window!

The screenshot shows a software window titled "Change PROPERTY" with a blue title bar. The window contains the following information:

- Property Information:** Prop No: AA-100, Property: Top Flight Apartments, Unit: TF Apt 100, Unit Type: 2 Bdr Apt.
- Navigation Tabs:** General, Financial, Preventive Maint (selected), Nameplate, Comments, Spares.
- Form Fields:**
 - PROP NO: AA-100
 - PROPERTY: Top Flight Apartments (dropdown)
 - STATUS: Active
 - UNIT: TF Apt 100 (dropdown)
 - UNIT TYPE: 2 Bdr Apt (dropdown)
- OCCUPANT INFORMATION:**
 - Tenant: Gabriel Delph, Telephone: 321-343-5643, Fax: 321-343-5882
 - SPOUSE: Mary Delph, CHILDREN: 0, PETS: German Sheppard
 - VEHICLE 1: 1999 Mercedes 350SL, TAG NO 1: DFR-0238A, PARK SPACE: 1078
 - VEHICLE 2: , TAG NO 2: , PARK SPACE:
- USER DEFINED FIELDS:**
 - Ins Carrier: Prudential Commercial Ins. Co.
 - Policy No: 3544-DX342
 - General Cond.: Excellent
 - USER 4: (empty)
 - USER 5: (empty)
 - USER 6: (empty)
- Footer:** Define user defined field names in Customize section. Buttons for OK, Cancel, and Help.

To add a new maintenance item for the selected property, select the Preventive Maint tab and click on the "Add Item" button.

Select the maintenance item description from the drop down table. To add new descriptions select the SUPPORT item from the main menu and then select MAINTENANCE ITEMS. Enter the estimated schedule hours to perform the new maintenance. This is used in the manpower requirements calculation for scheduling purposes.

Enter either the preventive maintenance interval in days, or alternatively, the meter reading interval and the unit of measure.

Enter the maintenance trade classifications and the labor hours required to perform the work.

Enter the last maintenance date for the property item. If the maintenance interval period is days, the next maintenance due date will be displayed.

If the maintenance interval selected above was mileage/meter reading, then enter the reading at the last maintenance performed, the unit of measure, the current reading and the date that the current reading was made. The next reading when the next maintenance is to be performed will be displayed.

Enter comments regarding the maintenance item. Detailed maintenance procedures for the new item may be added by selecting MAINTENANCE, then PROCEDURES from the main menu, or by selecting the Procedures icon. See Maintenance Item Procedures.

To change preventive maintenance intervals, schedule hours, or manpower requirements select "Change" from the Change Property window. To delete the maintenance item select "Delete".

MAINTENANCE WORK ORDERS

To the right of the Maintenance History table on the Property window are buttons to add, view maintenance work order records, or delete property maintenance records. Place the highlighted selector bar on the maintenance item work order that you want to view or change the maintenance work order record. Place the mouse cursor on the "Maint Details" button and click with the left mouse button.

Select the various Tabs to view the maintenance labor, materials and subcontracting information about the selected maintenance record.

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Property No:" above). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

OPENING NEW WORK ORDERS

Opening a new work order in PROPERTY PRO 2000 is very simple.

1. From the main menu select "MAINTENANCE".
2. Select "Property" from the sub menu, or select the Prop/Maint icon.
3. Use the mouse to scroll through the property table to highlight the property.
4. Use the mouse to select the "New Maint" button.
5. Reference information regarding the selected property is displayed at the top of the window. Also, the next sequential work order number is automatically assigned and is displayed.
6. When the above window is first opened the Maintenance Type will be displayed with the PM (Preventive Maintenance) block checked and the UNSCH (Unscheduled Maintenance) block will be hidden. If the maintenance action is emergency or unscheduled, place the mouse cursor on the PM block and click the left mouse button. This will deselect the PM block and will expose

- the UNSCH block. Accept the selection by pressing Tab.
7. The cursor will advance automatically to the next data entry field each time a field is accepted by pressing the Tab key. Alternately, use the mouse to advance to any specific data entry field.
 8. Fields with down arrow buttons will display drop down data selection tables. Use the mouse to depress the down button. Point to the desired selection from the table using the mouse cursor and accept by clicking the left mouse button.
 9. Do not enter a date in the "WORK ORDER COMPLETED" field until the work is actually completed. This date entry will close the work order.
 10. Maintenance labor, materials and subcontracting data may be entered by selecting the labeled tabs using the mouse. Point to the requested tab and click the left mouse button.

CLOSING A WORK ORDER

A work order is closed by entering a completion date for the maintenance activity. To close the work order select MAINTENANCE in the main menu of PROPERTY PRO 2000, then Property. Highlight the desired property in the upper table and select the desired work order in the lower maintenance table. Then select the "Change Maint" button.

Point to the "WORK ORDER COMPLETED" field with the mouse and enter the date that the maintenance effort was completed. Press "OK". The status of the work order will be changed from "Open" to "Closed".

PROCEDURES

The "Procedures" menu selection will result in the display of the steps and the detailed preventive maintenance procedure for selected property maintenance items. Use the mouse to select "Maintenance" at the main menu and then "Procedures". At the property number prompt select the "Select Property" button.

Highlight the property and maintenance item and then select the "SELECT PROPERTY" button.

The preventive maintenance procedure for the selected property and maintenance item will be displayed.

To add new procedure steps point to the "Add PM Proc" button and click with the left mouse button. To change existing procedure steps or to delete a procedure step, use the mouse cursor to highlight the item to be modified. Then select either the "Change" or the "Delete" button and click the left mouse button. Change the selected step, or add a new step, and press OK to accept the change or verify the deletion of the step.

PREVENTIVE MAINTENANCE DUE

Select Maintenance Due from the MAINTENANCE sub menu or select the PM Due icon.

Enter the start date for preventive maintenance records to be displayed and press Tab to accept. The program will exclude all records for which the maintenance due date is before the start date. Enter the end date. The program will exclude all records for which the maintenance due date is after the end date entered.

The preventive maintenance due table displays all the property items which are due for preventive maintenance during the period specified by the user. The due date for preventive maintenance is calculated by adding the specified maintenance interval to the date of the last preventive maintenance completion. If this is a new property the due date is calculated from the property in service date. Maintenance items that have a meter reading maintenance interval become due for maintenance when the current meter reading is greater than the meter reading at the last preventive maintenance plus the assigned meter interval.

The current meter reading for the highlighted maintenance item is displayed below the table with a description of the property.

If a work order is open for the item listed the work order number will be displayed. To print a copy of the work order for a particular preventive maintenance record, highlight the record using the mouse. Then depress the "PRINT WO" button, using the left mouse button, to print the work order.

WORK ORDER STATUS

The work order status is a listing of every work order that has been initiated. The pertinent information regarding the work order is provided. In addition to the date of initiation the current status of the work order is indicated as an "O" for a work order with no completion dates and a "C" for work orders that have a completion date.

OPEN WORK ORDERS

The open order listing displays every work order that has been initiated but not yet completed. The pertinent information regarding the work order is provided. In addition to the date of initiation the current preventive maintenance status of the work order is indicated.

SUPPORT

The support menu selection provides access to a series of files that contain data supporting the various maintenance activities. For first time program users these files are normally completed before proceeding with the entry of actual property or maintenance records. Most of the data is available at appropriate data entry fields in the form of drop down data selection tables in the property and maintenance sections of the program.

INVENTORY

The "Inventory" menu selection consists of the Item Master File, which contains detailed information regarding every maintenance part used, and the Inventory file, which indicates the current status of each part. This includes the vendor, last material transaction, and the current on hand balance. Whenever a part is allocated for use in a maintenance work order the inventory level is adjusted accordingly. Whenever the on hand inventory falls below the minimum stocking level specified in the Item Master file the part is automatically added to the Purchase Order list for action by the user.

SUPPORT DATA

The support menu selection provides access to a series of files that contain data supporting the various inventory windows. For first time program users these files are normally completed before proceeding with the entry of actual inventory records. Most of the data is available at appropriate data entry fields in the form of drop down data selection tables in the inventory and purchasing sections of the program.

ITEM MASTER FILE

The item master file defines the characteristics of the individual parts. To access the item master file select "INVENTORY" from the main menu, then select "Item Master File".

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Part No." above). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

The item master file window is a scrolling table listing of all the parts that are used in the maintenance system. The data may be presented in the sorted order by Stock Number, Part Number, Description, or Vendor as indicated by the tabs. Point to the tab and press the left mouse button for the desired sort order.

The pertinent data about each part is shown in the table. The cost, unit of measure, min and max stocking levels are indicated. Use the right scroll button to expose the quantity of the part that is currently on order. Additional detail about each part is available by selecting the "Change" button.

To add new parts to the item master file select the "Add Part" button using the mouse. To change existing data concerning the part position the highlighted selector bar on the desired part and select the "Change" button. To delete the entire part record select the "Delete" button.

INVENTORY

The inventory of parts on hand is accessed by selecting INVENTORY from the main menu, and then selecting "INVENTORY" from the sub menu.

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Part No:" above). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

The current inventory status is presented as a scrolling table of all the parts in the item master file with the current inventory balance and latest transactions indicated. Use the right scrolling button to view the current inventory balance.

The data is presented in sorted order by either Stock Number, Part Number, Part Description, or Vendor as indicated on the tabs above the table. Point to the desired sort order tab with the mouse and press the left mouse button.

The "Last Transaction" section of the table indicates the date of the last transaction and the quantity that was either issued or received on that date. A part is issued when it is entered as used on a maintenance work order. A part is received when the part is entered as being received against an outstanding order in the purchasing system.

The inventory balance (the amount of parts physically on hand) may be adjusted as required. This may be the result of cycle counting of the inventory or by a complete physical count of all the inventory. If there is a variance of actual count to the computer inventory balance point to the "Adjust Inventory" button with the mouse and press the left mouse button.

Change the inventory balance quantity to the correct balance and select OK.

PURCHASING

The "PURCH" menu selection enables the user to generate new purchase orders, view the status of open purchase orders, retrieve purchase order history, receive delivered parts and adjust the inventory automatically.

SUPPORT DATA

The support menu selection provides access to a series of files that contain data supporting the various purchasing windows. For first time program users these files are normally completed before proceeding with the entry of actual purchasing records. Most of the data is available at appropriate data entry fields in the form of drop down data selection tables in the inventory and purchasing sections of the program.

To access a support file to add, view or revise the data, position the highlighted selector bar on the desired file using the mouse pointer. Press the left mouse button to display the selected data.

PURCHASE ORDERS

The PROPERTY PRO 2000 program is designed to determine when parts used in the maintenance function depletes the inventory below the minimum stock level established in the item master file. When parts are "issued" (by adding parts to the material used on a maintenance or calibration work order) the on hand inventory is reduced accordingly. When this occurs the part is added to the table of "requested purchase orders" using the order quantity specified in the item master file. The user can scan this table periodically and select the items for which purchase orders are to be issued.

Select "PO's" from the purchasing main menu to view the table of all issued purchase orders.

To view only open purchase orders, select "OPEN PURCHASE ORDERS" from the menu.

REQUESTED PURCHASE ORDERS

Select "REQUESTED PURCHASE ORDERS" to view those parts which have fallen below the minimum stock level defined in the inventory system. Items will automatically be added to the list when parts are specified for use in a calibration or maintenance action (issued) and the stock level has been depleted below the minimum level.

To automatically generate purchase orders for the listed items point to each item that is to be included and press the left mouse button. Each item selected for purchase order generation will remain highlighted. To deselect an item, point to the item and press the left mouse button once. The item will not be highlighted. When all the selections have been made point to the "Print Marked PO's" button and press the left mouse button. Individual purchase orders will be printed for each vendor of the required parts. All parts from the same vendor will be combined on a single purchase order.

RECEIVE MATERIALS

To accurately track the purchase order system it is required to document the receipt of parts against the purchase order that was issued to a vendor for that part. When parts are received select the "RECEIVE MATERIAL" menu item from the Purchasing main menu.

The stock number of the part, the dates of issue and receipt, and the required quantity with the quantity received is shown. The date may be viewed in order of stock number, purchase order number, vendor, or date issued by selecting the appropriate tab.

This table listing are all of the current open orders. That is, those purchase orders for which there are one or more items that the quantity of the item received is less than the quantity of the item ordered.

The table displays the open purchase orders, the part number of the part, the quantity of the part ordered, the last received quantity and the total received quantity.

Select the purchase order of the received part by using the mouse to position the highlighted selector bar on the correct purchase order. The user may sort the data by Purchase order, Stock Number, Part Number, or by Vendor to aid in the selection process. Point to the desired sort tab using the mouse and press the left mouse button. When the correct purchase order is selected point to the "Receive Mat'l" button with the mouse and press the left mouse button. Enter the receive date and the quantity received to update the status.

OPEN PURCHASE ORDERS

A scrolling table listing of all open purchase orders is accessed by selecting PURCHASING from the main menu of MPRO 2000, then select PURCHASE ORDERS, then select OPEN PURCHASE ORDERS from the sub menu.

A purchase order is considered open if the quantity of parts received against the purchase order is less than the required quantity on the purchase order.

The listing of all open purchase orders is presented in sorted order by either Stock Number, Purchase Order Number, Part Description, or Vendor as indicated on the tabs above the table. Point to the desired sort order tab with the mouse and press the left mouse button.

The pertinent data about the purchase order is shown in the table. Additional detail about each purchase order is available by selecting the "Change" button.

To add a new purchase order point to the "Add PO" button with the mouse and press the left mouse button. To modify or delete an existing purchase order position the highlighted selector bar on the desired purchase order with the mouse and then select either the "Change" or "Delete" button with the mouse.

To print the selected purchase order point to the "Print PO" button and press the left mouse button.

MAINTENANCE REPORTS

The maintenance reports section provides an extensive choice of maintenance data reports, reports of property maintenance that are due for the user selected time period, reports of the maintenance interval for the property, maintenance overdue reports and a maintenance history report for any user selected property. Take the opportunity to explore the various report formats to fully understand the functions. The unique Management Analysis reports are of particular interest.

A powerful preview feature of the report on screen is provided for each report type. This allows you see the format of the report and the data selected for the report, before it is actually printed. The user, therefore, can review the data and make any necessary changes to the time period or choice of other variables before printing.

The management analysis reports provide the user with labor summary, maintenance cost data, maintenance manpower requirements, and maintenance department performance reports.

To access the report menu select "REPORTS" at the main menu of PROPERTY PRO 2000 and then select "MANAGEMENT ANALYSIS" at the sub menu.

The labor summary report provides all the maintenance labor expenditures over any user specified time period.

The cost summary report provides the labor, materials, and maintenance subcontracting costs incurred during the user specified time period. This report is also available for each department and for each cost center. This is very valuable to charge back departments or individual cost centers for maintenance work performed over any time period.

The manpower requirements report provides the maintenance labor requirements for open work orders in the system for any user specified time period.

The performance report calculates the efficiency of the maintenance department based on completed work orders for the time period specified by the user.

Place the highlighted cursor on the desired report and click with the left mouse button to view the preview window. Select the print icon with the mouse or select "File" and then "Print".

REQUESTING MAINTENANCE

The maintenance request system permits any employee with access to the program to request that maintenance be performed. The requester completes the information on the request screen to generate a request. The security in the program permits only a supervisor with a security level of 3 or better to convert the request to a maintenance work order. Only the maintenance supervisor can change or delete a maintenance request that has been entered.

To issue a maintenance request select MAINTENANCE, then "OPEN MAINT REQUESTS", or select the REQUEST icon from the main menu .

To add a new maintenance request select the "Request" icon, or "Open Maint Request" from the main menu, then the "Add Request" button. Complete the request information, including a complete description of the maintenance to be performed. A unique sequential maintenance request number is automatically assigned to the request.

To convert requests to work orders select MAINTENANCE, then "MAINTAIN WORK ORDERS". Highlight the request to be converted with the mouse cursor and clicking the left mouse button (deselect by placing the cursor on the request and again click the left mouse button. After all the selections are made select the "ISSUE WO" button. The requests are converted to work orders. The supervisor can view all closed requests, and delete unwanted requests by selecting MAINTENANCE, then "CLOSED WORK ORDERS".

METER READINGS

The interval between maintenance can be either time based (days, weeks, years) or meter based (running hours, mileage, etc.). For meter based maintenance it is necessary to periodically enter the meter readings for the property items involved. When the meter reading exceeds the reading at the last maintenance, plus the meter interval, the item will be listed as PM Due.

To enter the current meter reading select the "Meter" icon or select "Enter Current Meter Readings" from the MAINTENANCE sub menu.

The table lists all property items that have a meter interval for maintenance. For each item the current meter reading (last entered reading), the meter reading at the last maintenance, and the interval between maintenance is shown. If the current reading exceeds the last maintenance reading plus the interval, the maintenance is identified as being Due.

Place the highlighted selector bar on the maintenance item. For this item the pertinent data about the property is displayed below the table. To enter the current meter reading for this highlighted item enter the reading in the "New Meter Reading" data entry field and press "OK".

To rapidly select an property, type the property number in the locate field at the top of the window and press tab. The highlighted selector bar will be placed on that property. Use the arrow keys or the mouse to select the item for that property.

CUSTOMIZE

The customize main menu selection provides the ability to identify user fields in the property and maintenance sections of the program.

The user defined fields are easily identifiable in the property detail window and the maintenance detail window. The label of the user field is entered in the appropriate entry field of the customize window. That label will then appear whenever the property or maintenance detail windows are displayed.

AVAILABLE MANPOWER

The available manpower feature is used to identify the staffing of the maintenance department and the expected hours of availability over a 12 week scheduling period. This data is used in manpower capacity requirements planning to determine the manpower needed to planned maintenance activities. See also Manpower Requirements Planning.

The manpower availability should be updated weekly, or as desired, for accuracy of the planning activity. This is easily accomplished in PROPERTY PRO 2000. It is only necessary to enter the first period start date, the remaining eleven weeks are automatically calculated for the user. It is then only necessary to indicate changes in scheduled hours for each maintenance employee.

To add or modify the available manpower select "SUPPORT" from the main menu and the "AVAILABLE MANPOWER" from the sub menu.

TENANT MANAGEMENT

The Tenant Management section of the program provides the entry of detailed data about each Tenant/Occupant and monitors the financial status of the Tenant/Occupant account.

TENANT DATA

To add detailed Tenant/Occupant data select "TENANT MGMT" from the main menu, "TENANT DATA", then "Add Occupant".

Detailed occupant data is entered and is available for reference by management and for use throughout the program. When the rent amount and the day due is entered the rent will be automatically added to the Tenant Ledger each month on that day.

TENANT LEDGER

The Tenant Ledger provides the financial status of each Tenant/Occupant. To view the Tenant Ledger for an occupant select "TENANT BALANCE SUMMARY", highlight the tenant/occupant, then press the "TENANT DETAIL" button. All the individual financial transactions, and the current account balance, for this Tenant/Occupant is displayed. To add a new transaction press the "Add Transaction" button.

The Ledger system is very simple to use. Enter the Payment or Charge amount, the Account, the Period, if applicable, from the Calendar ("CAL" button), the Transaction Type and any comments about the transaction. Drop down selection tables are provided for ease and accuracy of data entry.

A selection of printed reports are also available from the TENANT MGMT menu display.

The upper scrolling table shows each maintenance department employee, his trade classification, and the hours of availability for that employee over a 12 week period starting at the date shown. Below the scrolling table the available hours for the employee highlighted in the table is shown for the entire 12 week period.

To change the calendar period simply enter the date of the first period in the "Starting Date" entry field and press tab. The remaining dates are adjusted automatically.

To add an employee, delete an employee, or to change the available hours for an employee select the appropriate button.

AFTER THE TOUR

After becoming thoroughly familiar with the various menu selections, experiment with the sample data provided by changing and adding records in each of the data areas. When the user is comfortable with the program remove (delete) the sample data and enter data pertaining to the company. Start by entering the known data in the Support files section. Then enter the Equipment detail data using the Maintenance menu selection. The user should then begin adding new maintenance work orders.

