

MEMO: Recommended Categories to Enable Work Order Analytics

Yardi is a powerful tool which can be leveraged to provide meaningful insights about day-to-day maintenance practices across a portfolio. However, the system must be set up correctly in order to harvest meaningful information from the piles of data that accumulate once the system is put in motion. One of the most important aspects of setting up a useful work order tracking system is property categorizing the different types of work orders so that they can be tracked in groups later on.

Suggested Work Order Priorities

Not all work orders are identical. As such, tracking them in one large homogenous group is not ideal. In order to leverage Yardi and the data stored within the system, Bright Power recommends that all work orders be categorized under the following items.

1. **Preventive/Scheduled** – Scheduled, recurring work orders in Yardi. Tracking of these work orders can be done to evaluate maintenance staff's compliance with the standardized PM Schedule.
2. **Apartment Turnover** – Tasks associated with turning over an apartment for a new tenant. Since these tasks are much different than typical repairs or scheduled PM items, they should be able to be tracked accordingly. Tracking these items at each property will help identify which properties are lagging behind in their turnover processes. Speeding up the turnover process will increase TCB's rent revenues. The first step in speeding up that process is setting a baseline for understanding how quickly each property is turning over units, and how quickly it is happening across the portfolio.
3. **Non-Emergency** – These work orders should be reserved for unscheduled repairs. This item covers many types of routine repairs – including replacement of light bulbs, unscheduled repainting, leak repairs, appliance repairs/replacements, etc.
4. **Emergency** – One additional category for emergency repairs is recommended. These work orders should only be for critical system failures. HVAC repairs when service is interrupted should be included here. Anytime time a building system completely fails – and cannot function before being fixed (no heat, now DHW, catastrophic leaks), the work required to get the system(s) back online should be categorized as "Emergency."



Suggested Sub-Categories

Sub-categories can be set up to further describe each individual work order. These sub-categories should be used to identify problematic building systems at different properties. Increases in the number of work orders in a particular category can be used to inform future capital upgrades.

1. **Inspections** - All scheduled inspections. These work orders should be used to track completion of the inspections themselves, not any repairs arising from the inspections themselves.
2. **Electrical** – all repairs of lighting, switches, outlets, (sub) meters, panels, generators, etc.
3. **Plumbing** – all repairs to showerheads, faucets, toilets, hot water heaters, leak repairs, etc.
4. **HVAC** – All HVAC related repairs including heating boilers, chillers, AC units, exhaust fans, rooftop units, thermostats, etc.
5. **Grounds** – Any exterior repairs including parking lots, garages, landscaping, irrigation, etc.
6. **Appliances** – Any repairs/replacements of appliances – both common areas and in-unit.
7. **Doors/Windows** – Any door/window repairs including rebalancing of windows, weatherstripping, door hardware replacements.
8. **Roof** – Any roof repairs.
9. **Painting** – Any painting that is completed on site.
10. **Pest Control** – Any exterminator calls needed on site.