

# Jobsheets and Reports

Mantra has a built-in report generator which means you can create your own reports or ask us to design them for you - report generator instructions are listed in the Mantra manual which is sent to you free of charge when you sign up for support at [www.bmstech.com/mantra/support.htm](http://www.bmstech.com/mantra/support.htm)

Jobsheets may be customized to suit your needs using report generator instructions

Here is a typical jobsheet  
 Mantra is supplied ready to run with a jobsheet layout that looks like this - you can create your own layouts if you wish - or order your layout from us - go to [www.bmstech.com/mantra/feedback.htm](http://www.bmstech.com/mantra/feedback.htm) to tell us what you need

```

ABC MEDICAL INC                                     10/10/07
Issued to: PLUMBER, GRADE 1                         Date Allocated : _____
Area 5 : Special Equipment                          Item      : AUTOCLAVE 002
=====
Parent   :                                           Maker    : Steamgen
Location : CSS                                       Model    : AC2
Category : Autoclave                               Serial # : ST34566

Size      :                                           :
Descriptn: Single-ended, 4-cycle                    :
Drawing   :                                           :

* WARNING: PERMIT TO WORK REQUIRED *
=====
JOB 1 Breakdown
Requested 10/10/07 Do By 11/11/07| Sign - Complete | Date | Remarks
-----|-----|-----|-----|-----|-----
Door seals split                    |         |         |         |
-----|-----|-----|-----|-----|-----
Deficiencies/Faults Found           | Action Taken (continue overleaf)
-----|-----|-----|-----|-----
|
|
|
-----|-----|-----|-----|-----
Date : _____ Follow-Up Action Stated Overleaf (tick box) []
Signed Inspector : _____ Signed Supervisor : _____
  
```

The top of the jobsheet shows the details of the item which has jobs to be done

Next come the jobs - there is only one here - a breakdown job with a description of the problem

Some space for you to make notes which Mantra can keep in the job history

You may want to sign here to prove who did the job

Remember that Mantra is ready to run so you will be issuing jobsheets like this almost immediately - then as you refine your needs you can change the words and the layout to suit your language and the way that you want to work - you can even have a different jobsheet style for each person or department if you wish!

Here is another jobsheet for the same item  
 there are 2 planned jobs to be done so  
 Mantra has combined them onto one page to make sure  
 you make only one trip to the item - as well as to save paper

ABC MEDICAL INC

12/12/07

Issued to: SMITH, JOHN

Date Allocated : \_\_\_\_\_

Area 5 : Special Equipment

Item : AUTOCLAVE 002

Parent :  
 Location : CSS  
 Category : Autoclave

Maker : Steamgen  
 Model : AC2  
 Serial # : ST34566

Size :  
 Descriptn: Single-ended, 4-cycle  
 Drawing :

Digital Thermometer                      Stopwatch

\* WARNING: PERMIT TO WORK REQUIRED \*

JOB 35 4 Weeks			
Requested	Do By	Sign - Complete	Remarks
12/12/07	01/01/08		
-----			
Check Cycle Times			
Check Temperature Settings			
Check Temperature Accuracy			
Check Usage Log			

JOB 36 1 Year			
Requested	Do By	Sign - Complete	Remarks
12/12/07	01/01/08		
-----			
Strip Down/Service/Reassemble			
Leave in Safe Working Order			

Deficiencies/Faults Found                      Action Taken                      (continue overleaf)

Date : \_\_\_\_\_ Follow-Up Action Stated Overleaf                      (tick box)                      []

Signed Inspector : \_\_\_\_\_ Signed Supervisor : \_\_\_\_\_

The jobsheet shows 'kit' needed to do these jobs - and advises that a permit is needed to work on this item

These are both planned jobs that are due - the first one every 4 weeks with 4 tasks, and the second has 2 tasks every year - you can set up a plan of work like this for each item and Mantra automatically does the paperwork for you

Mantra automatically allocates unique job numbers

This jobsheet is an example of planned jobs for John Smith -  
 the previous example is a breakdown job for a Grade 1 Plumber -  
 if all these jobs occur at the same time  
 and are all allocated to John Smith,  
 Mantra puts them on the same jobsheet to make sure  
 they are done with only one trip to the item

The next example uses a built-in Mantra feature called a masterlist - if you wish, you can use it to show the supervisor what jobs are being done now

```

MASTERLIST                                     12/12/07
-----
Area + Item          | Job      | Type      | Issued to      | Returned
-----
1 CC1                | 10       | Planned-1 |                 |
1 CC1                | 11       | Planned-2 |                 |
1 CC2                | 12       | Planned-1 |                 |
1 CC2                | 13       | Planned-2 |                 |
1 MM1                | 14       | Planned-1 |                 |
1 MM1                | 15       | Planned-2 |                 |
1 MM1                | 16       | Planned-3 |                 |
1 MM2                | 17       | Planned-1 |                 |
1 MM2                | 18       | Planned-2 |                 |
1 MM2                | 19       | Planned-3 |                 |
2 COMPUTER 001      | 29       | Planned-2 |                 |
2 COMPUTER 001      | 28       | Planned-1 |                 |
2 COMPUTER 001      | 38       | Shutdown-3|                 |
3 BOILER 001        | 3        | Unplanned |                 |
3 BOILER 001        | 30       | Planned-1 |                 |
3 COMPRESSOR 001    | 2        | Safety    |                 |
3 COMPRESSOR 001    | 31       | Planned-1 |                 |
3 COMPRESSOR 001    | 32       | Planned-2 |                 |
5 AUTOCLAVE 001     | 33       | Planned-1 |                 |
5 AUTOCLAVE 001     | 34       | Planned-2 |                 |
5 AUTOCLAVE 002     | 35       | Planned-1 | SMITH, JOHN    |
5 AUTOCLAVE 002     | 36       | Planned-2 | SMITH, JOHN    |
5 AUTOCLAVE 002     | 1        | Breakdown | PLUMBER, GRADE 1|
-----
Page 1

```

The masterlist is a special form of report - its layout is controlled by report generator instructions in the same way as report and jobsheet layouts are controlled

Previous examples showed jobsheet layouts with quite a lot of detail - some users may want an abbreviated jobsheet as shown below - this jobsheet was created by using a different jobsheet layout file

```

ABC TECHNICAL SERVICES                               02/02/08

Issued to _____ Date Allocated _____

=====
Area 1234567890123456789012345 | JOB 297 Planned-2
Item 1XXX                          |-----
Parts 22222222222222222222        | Sign - Complete | Date | Remarks
-----
|                                     |                 |
=====
Area 1234567890123456789012345 | JOB 343 Planned-8
Item 1XXX                          |-----
| Sign - Complete | Date | Remarks
-----
|                                     |
-----

```

There are lots of ways to get information out of Mantra -  
 you can print what you see on screen  
 or you can use the built-in report generator -  
 design your own reports or ask us to design them for you - go to  
[www.bmstech.com/mantra/feedback.htm](http://www.bmstech.com/mantra/feedback.htm)  
 to tell us what you need

You can create a wide range of reports  
 on your items and jobs  
 which are stored in the Mantra database -  
 a few simple examples follow

Job	Area + Item	Request	Confirm	Issue	Start	Complete
10	1 CC1	11/02/07	11/02/07	11/02/07	11/02/07	
12	1 CC2	11/02/07	11/02/07	11/02/07	11/02/07	11/02/07
4	1 MM1	06/06/06	06/06/06	07/06/06	07/07/06	07/07/06
15	1 MM1	09/07/06				
1001	1 MM2	01/01/07	01/03/07	01/03/07		01/03/07
3	3 BOILER 001	10/06/04				
2	3 COMPRESSOR 001	10/06/04				
1003	5 AUTOCLAVE 001	02/02/07	02/02/07	02/02/07		03/03/07
1	5 AUTOCLAVE 002	05/05/04	05/05/04			
1002	5 NIR	02/02/07	02/02/07	02/02/07	02/02/07	02/02/07

This is a report showing just the essential dates for jobs - sorted by area and item...

note that Mantra's date format varies depending on your country and preferences

This report shows the planned maintenance scheduling for each item...

Mantra has calculated the scheduled interval in days and times per year - you can export the data to a spreadsheet for analysis

AREA + ITEM	01/01/07	PLAN	SCHEDULE	DAYS	TIMES/YEAR	LAST JOB
1 VEHICLE 7351	1	9000 Miles/6 Months	182	2.01	09/09/06	
1 CONVEYOR 001	2	2 Years	730	0.50	12/02/05	
1 VEHICLE 7398	1	9000 Miles/6 Months	182	2.01	12/12/06	
1 CONVEYOR 001	2	2 Years	730	0.50	12/12/05	
1 MM1	1	20 Weeks	140	2.61	10/10/06	
1 MM1	2	18 Months	547	0.67	08/04/06	
1 MM1	3	2 Years	730	0.50	11/07/06	
1 MM2	1	20 Weeks	140	2.61	05/05/06	
1 MM2	2	18 Months	547	0.67	08/08/05	
1 MM2	3	2 Years	730	0.50	08/08/05	
2 COMPUTER 001	1	4 Weeks	28	13.04	12/12/06	
2 COMPUTER 001	2	6 Mnths From 1/01/06	182	2.01	07/07/06	
2 COMPUTER 001	3	At Shutdown			08/08/06	
3 BOILER 001	1	26 Weeks	182	2.01	10/10/06	
3 COMPRESSOR 001	1	6 Months	182	2.01	11/11/06	
3 COMPRESSOR 001	2	1 Year	365	1.00	02/02/06	

Area + Item	Maker	Size
1 CC1	Convey plc	
1 CC2	Convey plc	
1 MM1	General Plant Inc	5HP
1 MM2	General Plant Inc	5HP
2 402.ZB.PM.17T.1	MTL	
2 402.ZB.PM.17T.9	MTL	
2 404.ZB.PM.16T	MTL	
2 404.ZB.PM.18T	MTL	
2 COMPUTER 001	Hewpaq Inc	
3 BOILER 001	Fabricators Ltd	20,000 kg/hr
3 COMPRESSOR 001	Compressa SA	
5 AUTOCLAVE 001	Steamgen	
5 AUTOCLAVE 002	Steamgen	
5 NIR	Broox	

This report gives some brief details of items in the Mantra database...

of course your own reports will have data and headings that are more meaningful to your way of working

This is the job history for one item - the report generator has instructions which let you choose an item each time you request the report

AREA: Factory Building 1 ITEM: CC1

JOB LIST 03/03/08

Job	Type	Request	Issue	Complete	Details
10	Planned-1	11/02/07	11/02/07		
11	Planned-2	11/02/07	11/02/07		

## JOBS OUTSTANDING ON 10/10/07

Job	Type	Resource	Issued	Area + Item
10010	Planned-1	SMITH, JOHN T	09/09/07	1 CC1
10011	Planned-2	SMITH, WILLIAM	09/09/07	1 CC1
10012	Planned-5	SMITH, JOHN T	09/09/07	1 CC2
10013	Planned-9	TEAM 49	09/09/07	1 CC2
10014	Planned-1		09/09/07	1 MM1
10015	Planned-2		09/09/07	1 MM1
10016	Planned-3		09/09/07	1 MM1
10017	Planned-1		09/09/07	1 MM2
10018	Planned-2		09/09/07	1 MM2
10019	Planned-4		09/09/07	1 MM2
10029	Planned-2	DATAMAN INC	09/09/07	2 COMPUTER 001
10028	Planned-1	DATAMAN INC	09/09/07	2 COMPUTER 001
10038	Shutdown-3	DATAMAN INC	09/09/07	2 COMPUTER 001
10003	Unplanned		09/09/07	3 BOILER 001
10030	Planned-1		09/09/07	3 BOILER 001
10002	Safety	FARADAY, M	09/09/07	3 COMPRESSOR 001
10031	Planned-1		09/09/07	3 COMPRESSOR 001
10032	Planned-2		09/09/07	3 COMPRESSOR 001
10033	Planned-6	FAWCETT, ANGELA	09/09/07	5 AUTOCLAVE 001
10034	Planned-7		09/09/07	5 AUTOCLAVE 001
10035	Planned-1		09/09/07	5 AUTOCLAVE 002
10036	Planned-2		09/09/07	5 AUTOCLAVE 002
10001	Breakdown	PLUMBER, GRADE 1	09/09/07	5 AUTOCLAVE 002
10037	Planned-1		09/09/07	5 NIR

This simple example of a report shows jobs outstanding in October 2007