How to Setup PM and Repair To-Do Hot List Filters

The Equipment Hot List displays PMs and Repairs To-Do that fit user-defined filter criteria.
- PMs and Repairs To-Do can be added to Repair Orders electronically to reduce manual data entry.
- To quickly include or exclude all Equipment records within the selections field, open the field and select **Include/Exclude All Records** from the **Edit** menu.
- Saved Hot List filters default to sort alphanumerically by the Description field, so placing a number at the beginning of your saved filter name (e.g., 01 Weekly PM and Repair-To-Do List) enables you to view more frequently run filters at the top of your list.
- To print the Hot List, click the drop-down arrow to the right of the **Printer** icon and select **Hot List**. The preview will display on screen and may be exported or printed.

I. **Setup a Hotlist Filter**
1. *Access the Equipment Snapshot screen*
    i. Use the camera icon or select it from the File menu
2. *Click the Hot List tab at the bottom of the screen (if it is not already selected)*
3. *Highlight the Hot List Filter labeled as **Default** in the description column*
4. *Filter desired "Selections": Equipment#, ServInd, Roll-up Groups, or PM Group- System Codes*
    i. Click the Selection field
    ii. Click the ellipsis button to open the Edit window
    iii. Uncheck the records that should be excluded
    iv. Click OK to accept filter changes
    v. Repeat for each field
5. *Check or populate "HotList Record Selection"*
    i. Include Repair To-Do – Lists Repairs To-Do in addition to PM Services
    ii. AutoCheck Add to Entry – automatically checks the Add to Entry checkbox
    iii. High Priority Only – Displays only High Priority Repairs To-Do and Overdue PMs
    iv. "Until Due" value should reflect the number of days, miles, hours, or other until a PM is due
        - *E.G. for Days Until Due, a value of 7 means the Hot List will display PMs that are overdue, due now, or due within 7 days when the Hot List is run*
        - *E.G. for Miles Until Due a setting of 500 means that PMs that are overdue, due now, or due within 500 miles will display when the Hot List is run*
        - *Multiple Until Due can be identified, and PMs that fulfill any one criteria will be displayed*
    v. Include PMs – Include jobs that are currently assigned to a repair order
    vi. Expiring Warranty - Include Warranties nearing expiration
        - *Define the range in either Days, Miles, Hours, or Other within which the expiring warranties are to be included*
6. *Click the **Start icon** (green traffic light)*
    i. The PMs and/or Repair To-Dos will be displayed on the bottom half of the screen
7. *(Not Required) Click the **Save icon** (diskette) to save the filter for future use*
    i. Name the Hot List
    ii. Click OK