



Property Management User Guide



Reference information and instructions for
Building Engines system administrators

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Overview

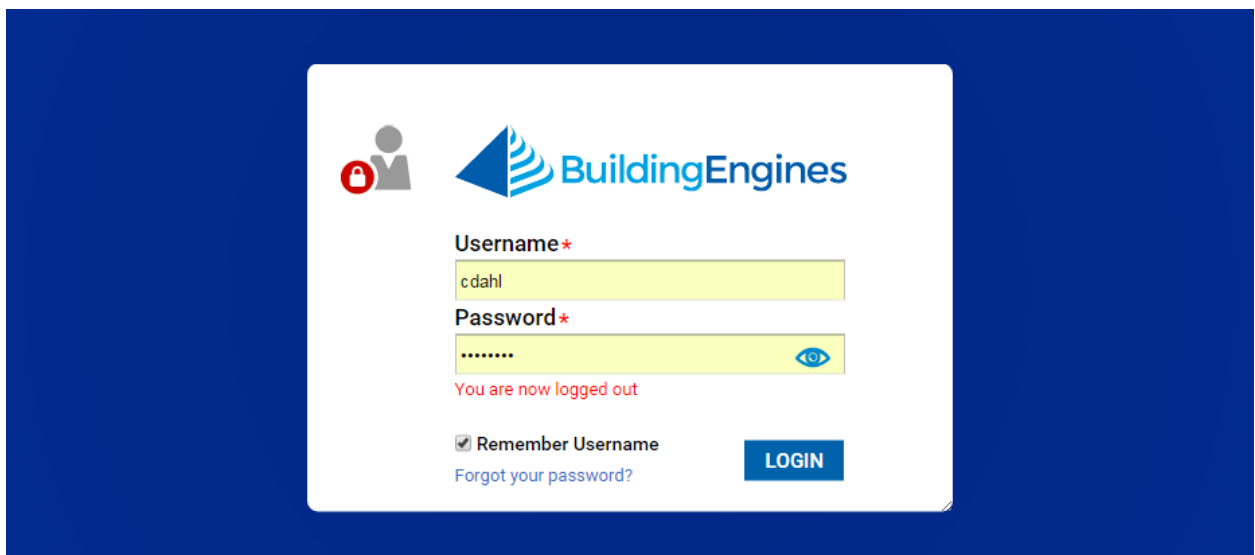
Building Engines' Property and Tenant Management System empowers you to capture, communicate, assign and report on all the elements that impact the tenant experience, as well as your operating efficiency and profitability. It simplifies operational complexities by improving visibility, extracting information, and speeding tenant communications. The results include a better tenant experience, higher operating efficiency, increases on the top line and higher NOI.

This handbook provides a collection of basic instructions and concise information to serve as a ready reference for Building Engines users and System Administrators.

Accessing the Building Engines System

To access the Building Engines desktop application:

1. Navigate to <http://buildingengines.com/login>.
2. Enter your username and password into the appropriate fields.



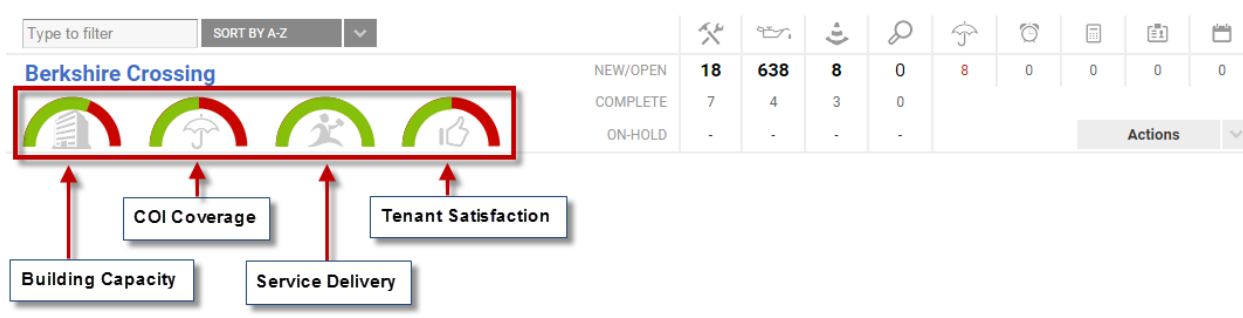
3. Click **Login**.

Homepage Dashboard

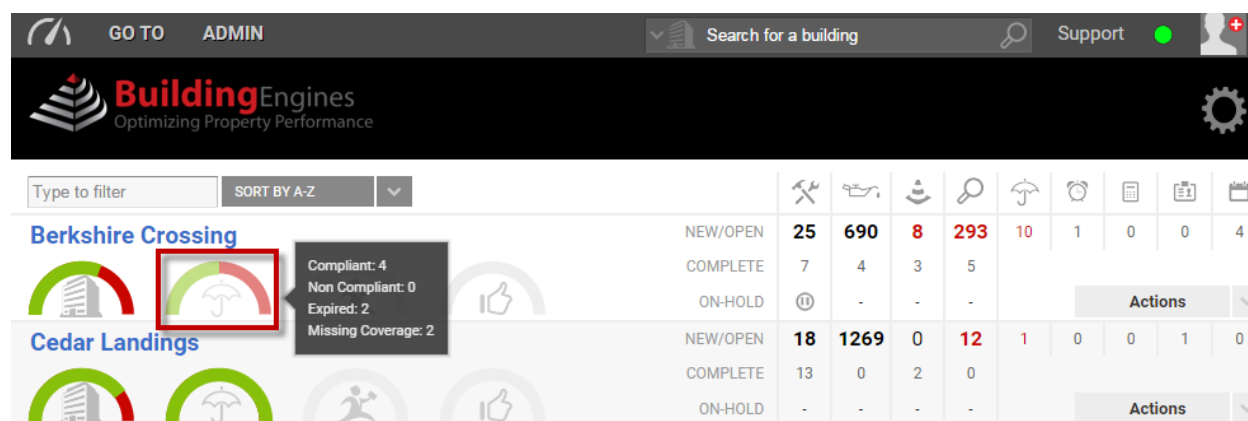
The Homepage Dashboard provides you with valuable insight across all of the modules you have installed in Building Engines. From the dashboard, you are able to view and access building information, liability, service delivery, as well as operational tasks.

Homepage Gauges

The Homepage gauges provide insight into your building's capacity, COI coverage, service delivery, and tenant satisfaction, if the corresponding modules are configured in Building Engines.



Hovering over a gauge produces an information bubble with the values that make up that specific gauge. Furthermore, clicking a particular gauge brings you into the corresponding module for that building.



To toggle which gauges are displayed:

1. Click the gear icon that is located in the upper right corner.
2. Select the gauges you want displayed, and click **SAVE**.

Module Grid

The module grid located on the homepage allows you to quickly identify and navigate to open tasks at each building. Each icon denotes a different module in the application. Hovering over the task icon displays a bubble denoting the module represented.

Work Order

Type to filter

SORT BY A-Z

Berkshire Crossing

NEW/OPEN

18

638

8

0

8

0

0

0

0

COMPLETE

7

4

3

0

ON-HOLD

-

-

-

-

Actions

Cedar Landings

NEW/OPEN

18

1190

0

0

1

0

0

1

0

COMPLETE

11

0

2

0

ON-HOLD

-

-

-

-

Actions

Washington Avenue

NEW/OPEN

6

698

0

0

0

0

0

-

0

COMPLETE

3

8

0

0

ON-HOLD

-

-

-

-

Actions

Hovering over a value in the **NEW/OPEN** column produces an information bubble that breaks out the **New** from the **Open** set of tasks. Clicking on either the **New** or **Open** set of tasks brings you to that module's tasks.

Type to filter											SORT BY A-Z																			
Berkshire Crossing				NEW/OPEN	18	1190	0	0	1	0	0	0	1	0	Actions															
				COMPLETE	11	0	2	0																						
				ON-HOLD	-	-	-	-						Actions																
Cedar Landings				NEW/OPEN	6	698	0	0	0	0	0	-	0	Actions																
				COMPLETE	3	8	0	0																						
				ON-HOLD	-	-	-	-					Actions																	
Washington Avenue				NEW/OPEN	6	698	0	0	0	0	0	-	0	Actions																
				COMPLETE	3	8	0	0																						
				ON-HOLD	-	-	-	-					Actions																	

Building Profile

The Building Profile provides a centralized location to access building information and key contacts.

To locate the Building Profile, click the building name.

Type to filter	SORT BY A-Z							
Berkshire Crossing			NEW/OPEN	25	690	8	293	
				COMPLETE	7	4	3	5
				ON-HOLD		-	-	-
Cedar Landings			NEW/OPEN	18	1269	0	12	
				COMPLETE	13	0	2	0
				ON-HOLD	-	-	-	-

To edit building information:

1. Click and expand the section you want to update.
2. Click located in the upper right corner of the section.
3. Use the fields to edit the information.

Building Data

BUILDING ID 00007A87052	SQUARE FEET (OR UNITS) 701200	CODE
BUILDING NAME Berkshire Crossing	LAND SIZE (SQ FT) 160000	YEAR BUILT 1984
STREET ADDRESS 896 Roland Circle	INDUSTRY TYPE Demonstration	CERTIFICATE OF OCCUPANCY DATE 06/01/2020
CITY/STATE/ZIP Boston, MA 02455	TIMEZONE EST	FLOORS 8
MAIN PHONE # 555-555-5555	BUILDING HOURS <input checked="" type="checkbox"/> Enable Building Hours 7:30 am 6:30 pm <input checked="" type="checkbox"/> Exclude Weekends	ENERGY STAR® SCORE (1-100) 90
		LEED CERTIFIED n/a

SAVE CANCEL

4. Click **SAVE**.

Building List

The Building List allows you to create a sortable list of the buildings within your profile. Once you are viewing the Building List you can click the Building name to view the Building Profile.

To create a Building List:

1. Click **Go To → Building List**.
2. (Optional) Use the column filters to sort your Building List.
3. Click a **BUILDING** name to access the Building Profile.

To Share the Building List:

1. From the Building List, click **SHARE** and select a format.
2. Use the recipient builder to select recipients, and click **SEND**.

To Export the Building List:

1. From the Building List, click **EXPORT** and select a format.
2. A new tab opens and the export appears at the bottom of the page.

Universal Building and Task Search


The Universal Building and Task Search allows you to search for and navigate to a Building, Work Order, Preventive Maintenance Task, or Incident from any page.

This section describes the process of using the Universal Building and Task Search.

To search:

1. Click the Search icon and select the type (Building, Work Order, Preventive Maintenance Task, or Incident) of search you want to execute.



2. Enter either the exact task number, or building information, and click the  icon.

Actions Tab

The Actions tab is a building specific dropdown located in the Module grid. Clicking on this tab allows you to quickly navigate to commonly used modules in the application.

The screenshot shows the Building Engines interface. At the top is a navigation bar with 'GO TO ADMIN', 'New Look' (with a green dot), 'Support', and 'Log Out'. Below this is a table with columns for building names and various metrics. The buildings listed are Berkshire Crossing, Cedar Landings, and Washington Avenue. Each building has a row for 'NEW/OPEN', 'COMPLETE', and 'ON-HOLD' status. To the right of the table is a dropdown menu labeled 'Actions'. The dropdown menu is open, showing a list of actions: Create Work Order, Create Recur. Work Order, Closed Work Orders, Tenants, Vendors, Equipment Library, Task Calendar, Expected Visitors, and Submit Visitor.

Building	NEW/OPEN	COMPLETE	ON-HOLD
Berkshire Crossing	18	638	8
Cedar Landings	18	1190	0
Washington Avenue	6	698	0

Work Order Management

The Work Order module allows both property management employees and tenants to submit work orders for occupied spaces and common areas. Once you submit a work order, you have the ability to track the lifecycle of the work order, add files, view comments, and generate invoices.

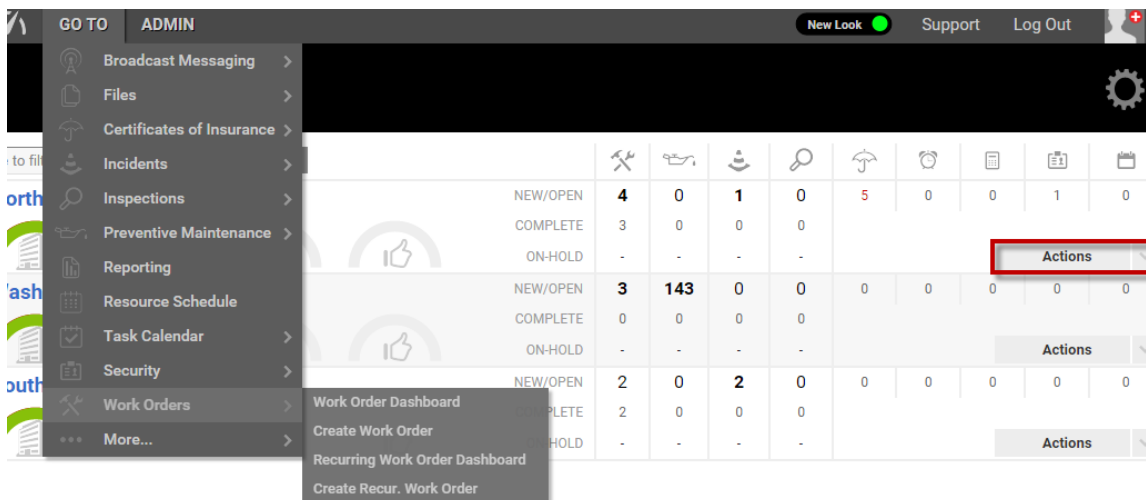
This user guide describes the process of creating a work order from the desktop version.

Creating a New Work Order

This section describes the process of creating a new work order.

To create a work order:

1. Click **Go To → Work Orders → Create Work Order**, or select **Create Work Order** from the **Actions** menu.



2. Complete the required fields denoted with an asterisk (*).
3. (Optional) Click **Keep me informed** to be notified when updates are made to the work order.
4. (Optional) Click **Critical** to denote the work order as critical on the work order search grid and to change the header color to red.
5. Click **SAVE**.

Creating a Scheduled Work Order

If you know the scope and timing of a work order ahead of time, you can create a scheduled a work order via the desktop version.

To create a scheduled work order:

1. Click **Go To → Work Orders → Create Work Order**, or select **Create Work Order** from the **Actions** menu.
2. Complete the required fields denoted with an asterisk (*).
3. (Optional) Click **Keep me informed** to be notified when updates are made to the work order.
4. (Optional) Click **Critical** to denote the work order as critical on the work order search grid and to change the header color to red.

5. Navigate to the **CREATE** field and select **Scheduled**.

6. Click the calendar icon and select a date and time for the work order to be created.
7. (Optional) Select a **CREATE WO IN ADVANCE** time to give the assignee advance notice.
8. Click **Submit**.

Creating a Recurring Work Order

If you know the scope and timing of a work order ahead of time, and it occurs on more than one occasion, you can place a recurring work order via the desktop version.

To create a recurring work order:

1. Click **Go To → Work Orders → Create Recur. Work Order**, or select **Create Recur. Work Order** from the **Actions** menu.

2. Select a **BUILDING**, **TENANT**, **FLOOR / SUITE**, and **ASSIGNEE**.

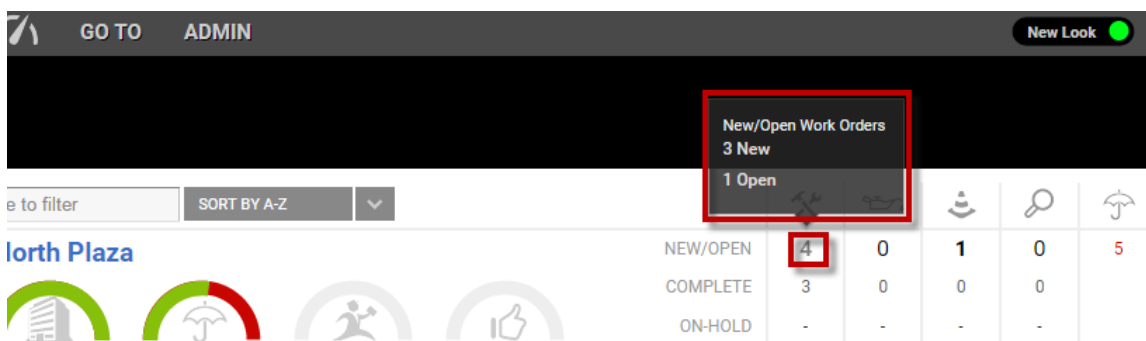
3. Confirm the **TASK TYPE** is: **Recurring Work Order**.
4. Select an **ISSUE TYPE**.
5. Enter the **TIME** you want the recurring work order to be created.
6. (Optional) Select a **CREATE WO IN ADVANCE** time to give the assignee advance notice.
7. Enter the frequency in the **RECURRENCE** field.
8. (Optional) Enter work order details in the **DETAILS** field.
9. Click **SAVE**.

Searching for Existing Work Orders

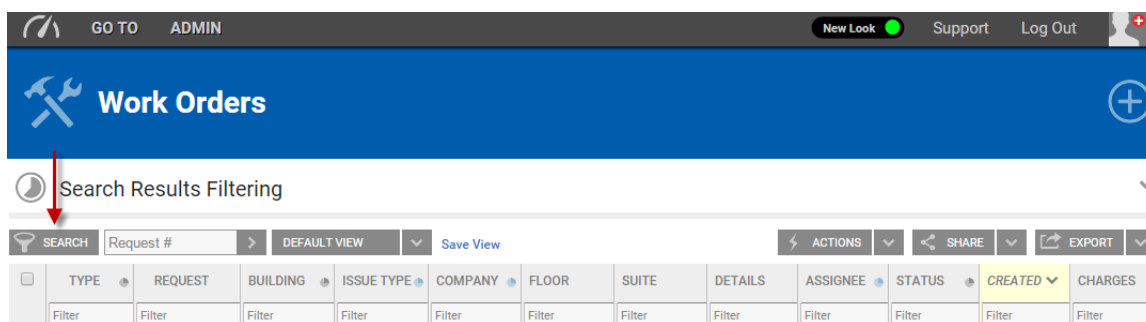
You can search existing work orders using the home page dashboard numbers, the work order search filters, or by the work order number. This section describes the process of searching for an existing work order.

To search for an existing work order using the home page dashboard:

1. Scroll down and navigate to the appropriate building.
2. Navigate over the **NEW/OPEN** figure, and either click the value shown, or navigate into the information bubble and click either the **New** or **Open** work order value.



3. If the work order you are searching for does not appear in the search grid, click **SEARCH** to use the work order search filters.



- Click on one of the status numbers located within the **Work Order** column.

Type to filter

SORT BY A-Z

NEW/OPEN

COMPLETE

ON-HOLD

4

3

-

0

0

-

1

0

-

0

0

-

5

0

0

1

0

Actions

- From the **Work Orders** page, click **SEARCH**.
- Using the Search field, select a building, the **Cancelled** status, a past date range, and click **SEARCH**.

Searching for a Recurring Work Order

You can search recurring work orders using the dedicated recurring work order dashboard. This section describes the process of searching for a recurring work order.

To search for a recurring work order:

- Click **Go To → Work Order → Recurring Work Order Dashboard**, or select **Recurring Work Order Dashboard** from the **Actions** menu.
- If the recurring work order you are searching for does not appear in the search grid, click **SEARCH** to use the work order search filters.

Editing a Work Order

Following the creation of a work order, if you have work order edit access, you have the ability to edit the original work order details. This section describes how to edit an existing work order.

To edit a work order:

- Scroll down and navigate to the appropriate building.
- Click on one of the status numbers from the **Work Order** column.

Type to filter

SORT BY A-Z

North Plaza

NEW/OPEN

4

0

1

0

5

0

0

1

0

COMPLETE

3

0

0

0

ON-HOLD

-

-

-

-

Actions

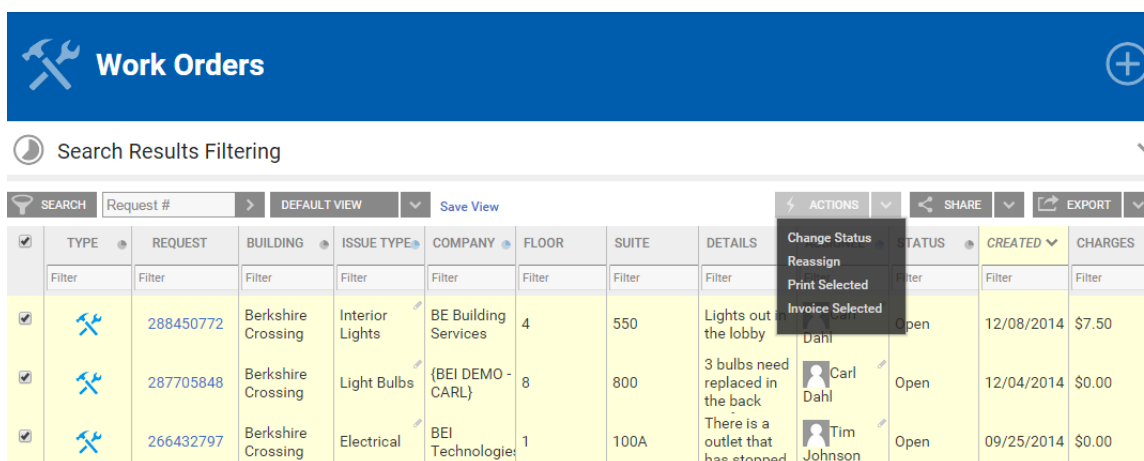
- From the **Work Orders** page, click **SEARCH**, and use the search parameters to locate the intended work order.
- Open the work order and click **Edit Details**.
- Make the appropriate edits using the available fields and click **SAVE**.

Changing the Status of a Work Order

This section describes the process of changing the status of a work order.

To change the status from the **Work Orders** page:

1. Select the work orders you want to change the status for using the check boxes located to the left of the work order(s).
2. Click the **ACTIONS** dropdown and select **Change Status**.



The screenshot shows the 'Work Orders' page header with a blue bar containing a wrench and screwdriver icon and a plus icon. Below the header is a 'Search Results Filtering' section. The main table has columns: TYPE, REQUEST, BUILDING, ISSUE TYPE, COMPANY, FLOOR, SUITE, DETAILS, ACTIONS, STATUS, CREATED, and CHARGES. The ACTIONS dropdown menu is open, showing options: Change Status, Reassign, Print Selected, and Invoice Selected. The table contains three work orders:

TYPE	REQUEST	BUILDING	ISSUE TYPE	COMPANY	FLOOR	SUITE	DETAILS	ACTIONS	STATUS	CREATED	CHARGES
<input checked="" type="checkbox"/>	288450772	Berkshire Crossing	Interior Lights	BE Building Services	4	550	Lights out the lobby	Change Status Reassign Print Selected Invoice Selected	Open	12/08/2014	\$7.50
<input checked="" type="checkbox"/>	287705848	Berkshire Crossing	Light Bulbs	{BEI DEMO - CARL}	8	800	3 bulbs need replaced in the back	Carl Dahl	Open	12/04/2014	\$0.00
<input checked="" type="checkbox"/>	266432797	Berkshire Crossing	Electrical	BEI Technologies	1	100A	There is a outlet that has stopped	Tim Johnson	Open	09/25/2014	\$0.00

3. Change the work order **STATUS**, add a comment if applicable, and click **SAVE**.

To change the status from within the work order:

1. Click **CHANGE STATUS**.
2. Change the work order **STATUS**, add a comment if applicable, and click **SAVE**.

Canceling a Work Order

If a work order is made in error or you no longer need the service, either the property management employee or the tenant who originally submitted the work order can cancel it.

To cancel a work order from within the work order:

1. Click **CHANGE STATUS**.
2. Select **Cancelled** from the **STATUS** dropdown.
3. Click **SAVE**.

Canceling a Recurring Work Order

If a recurring work order is made in error or you no longer need the service, the property management employee can cancel all future occurrences from the Recurring Work Order Dashboard.

To cancel a recurring work order:

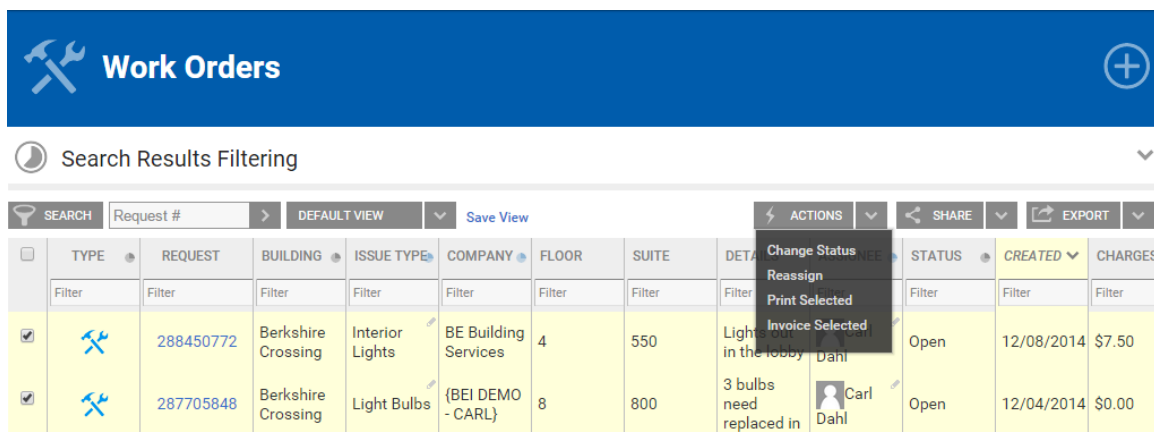
1. Click **Go To → Work Orders → Recurring Work Order Dashboard**.
2. Use the **SEARCH** button, and/or column filters to locate the recurring work order.
3. Select the appropriate recurring work order.
4. Click **DELETE**, and then confirm by clicking **OK**.

Reassigning a Work Order

During the lifecycle of a work order, you may assign and/or reassign a work order multiple times. This section describes the process of reassigning a work order.

To reassign from the **Work Orders** page:

1. Select the work orders you want to reassign using the check boxes located to the left of the work order(s).
2. Click the **ACTIONS** dropdown and select **Reassign**.



The screenshot shows the 'Work Orders' dashboard with a table of work orders. The table has columns for TYPE, REQUEST, BUILDING, ISSUE TYPE, COMPANY, FLOOR, SUITE, DETAILS, STATUS, CREATED, and CHARGES. Two work orders are listed: one for 'Interior Lights' and another for 'Light Bulbs'. The 'ACTIONS' dropdown menu is open, showing options: Change Status, Reassign, Print Selected, and Invoice Selected. The 'Reassign' option is highlighted.

	TYPE	REQUEST	BUILDING	ISSUE TYPE	COMPANY	FLOOR	SUITE	DETAILS	STATUS	CREATED	CHARGES
<input checked="" type="checkbox"/>		288450772	Berkshire Crossing	Interior Lights	BE Building Services	4	550	Light in the lobby	Open	12/08/2014	\$7.50
<input checked="" type="checkbox"/>		287705848	Berkshire Crossing	Light Bulbs	{BEI DEMO - CARL}	8	800	3 bulbs need replaced in	Open	12/04/2014	\$0.00

3. In the dialog box, select the appropriate assignee, notification method, and enter a message if applicable.
5. Click **SAVE**.

To reassign from within the work order:

1. Click **REASSIGN**.

Interior Lights - #288450772
Berkshire Crossing - BE Building Services

REQUESTED BY: Rick Richards
ASSIGNED TO: Carl Dahl
ASSIGNED ON: 12/08/2014 01:21 PM
ISSUE TYPE: Interior Lights
FLAG: -- No Flag --
STATUS: Open

BUILDING: Berkshire Crossing
TENANT: BE Building Services
FLOOR: 4
SUITE: 550
LOCATION: Lobby

CREATED: 12/08/2014 01:21 PM
ACKNOWLEDGED: 12/08/2014 01:21 PM
ARRIVED: 12/08/2014 01:22 PM
SERVICE LEVEL: Priority 2
TARGET FOR OPEN: 12/08/2014 02:21 PM
TARGET FOR COMPLETE: 12/09/2014 08:21 AM

Details: Lights out in the lobby

REASSIGN CHANGE STATUS ADD COMMENT HOLD SHARE PRINT

2. In the dialog box, select the appropriate assignee, notification method, message preferences, and enter a message if applicable.
3. Click **SAVE**.

Placing a Work Order on Hold

If you want to stop tracking time for a particular work order you can place the work order on-hold. This section describes the process of placing a work order on-hold.

To place a work order on-hold:

1. Locate and open the work order.
2. Click **HOLD**.

Interior Lights - #288450772
Berkshire Crossing - BE Building Services

REQUESTED BY: Rick Richards
ASSIGNED TO: Carl Dahl
ASSIGNED ON: 12/08/2014 01:21 PM
ISSUE TYPE: Interior Lights
FLAG: -- No Flag --
STATUS: Open

BUILDING: Berkshire Crossing
TENANT: BE Building Services
FLOOR: 4
SUITE: 550
LOCATION: Lobby

CREATED: 12/08/2014 01:21 PM
ACKNOWLEDGED: 12/08/2014 01:21 PM
ARRIVED: 12/08/2014 01:22 PM
SERVICE LEVEL: Priority 2
TARGET FOR OPEN: 12/08/2014 02:21 PM
TARGET FOR COMPLETE: 12/09/2014 08:21 AM

Details: Lights out in the lobby

REASSIGN CHANGE STATUS ADD COMMENT HOLD SHARE PRINT

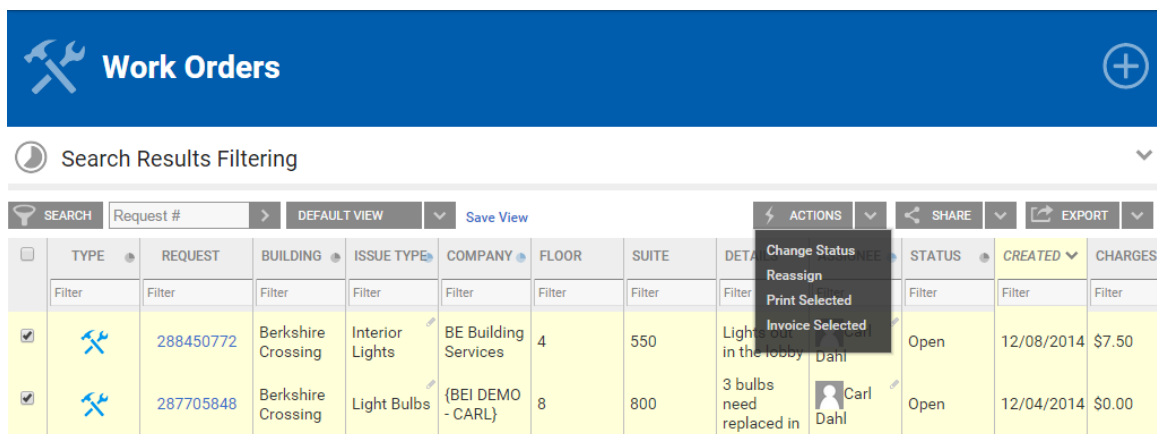
3. Provide a reason for placing the work order on hold and click **SAVE**.
4. To resume work on the work order, click **RESOLVE HOLD**.

Printing a Work Order and/or Invoice

This section describes the process of printing work orders and invoices.

To print a work order from the **Work Orders** page:

1. Select the work orders you want to print using the check boxes located to the left of the work order(s).
2. Click the **ACTIONS** dropdown and select **Print Selected**.



Work Orders

Search Results Filtering

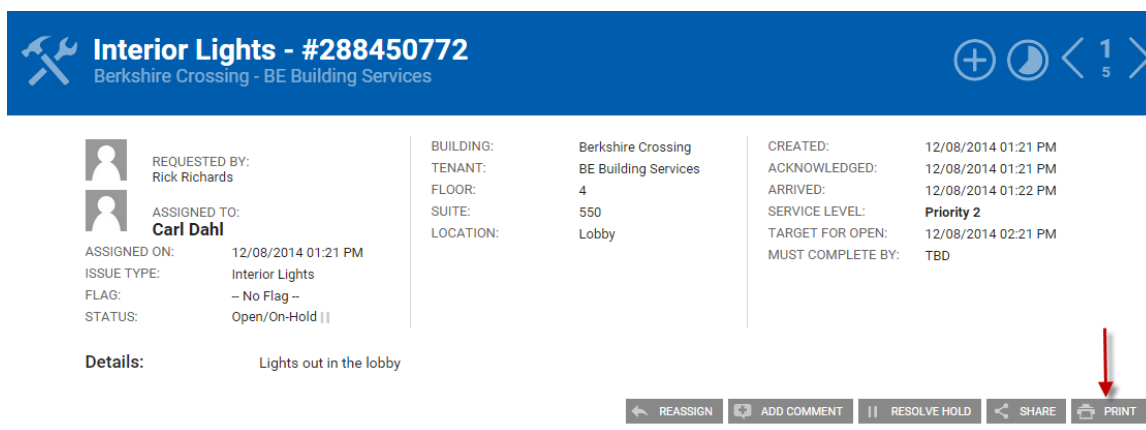
SEARCH Request # DEFAULT VIEW Save View

	TYPE	REQUEST	BUILDING	ISSUE TYPE	COMPANY	FLOOR	SUITE	DETAILS	STATUS	CREATED	CHARGES
<input checked="" type="checkbox"/>		288450772	Berkshire Crossing	Interior Lights	BE Building Services	4	550	Lights out in the lobby	Open	12/08/2014	\$7.50
<input checked="" type="checkbox"/>		287705848	Berkshire Crossing	Light Bulbs	(BEI DEMO - CARL)	8	800	3 bulbs need replaced in lobby	Open	12/04/2014	\$0.00

ACTIONS: Change Status, Reassign, **Print Selected**, Invoice Selected

To print a work order from within a work order:

1. Locate and open the work order.
2. Click **PRINT**.



Interior Lights - #288450772
Berkshire Crossing - BE Building Services

REQUESTED BY: Rick Richards
ASSIGNED TO: Carl Dahl
ASSIGNED ON: 12/08/2014 01:21 PM
ISSUE TYPE: Interior Lights
FLAG: ~ No Flag ~
STATUS: Open/On-Hold ||


BUILDING: Berkshire Crossing
TENANT: BE Building Services
FLOOR: 4
SUITE: 550
LOCATION: Lobby

CREATED: 12/08/2014 01:21 PM
ACKNOWLEDGED: 12/08/2014 01:21 PM
ARRIVED: 12/08/2014 01:22 PM
SERVICE LEVEL: Priority 2
TARGET FOR OPEN: 12/08/2014 02:21 PM
MUST COMPLETE BY: TBD

Details: Lights out in the lobby

REASSIGN ADD COMMENT RESOLVE HOLD SHARE **PRINT**



To print a single work order invoice:

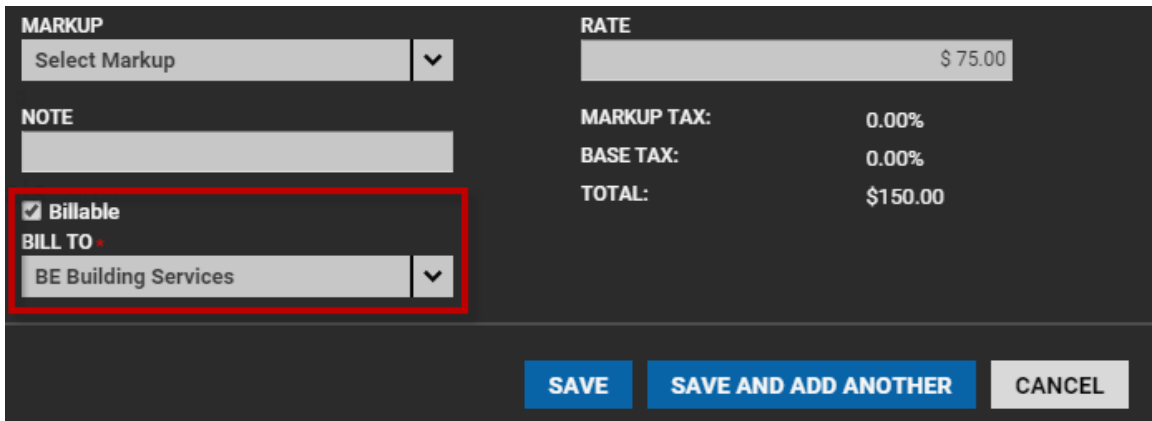
1. Locate and open the work order.
2. In the **Labor and Materials** section of the work order, click  icon.

Adding Charges to Multiple Entities on a Single Work Order (Split Billing)

If configured, Split Billing allows you to add charges, and invoice multiple entities, from within a single work order. *Note: To enable the Split Billing configuration and to learn more about this feature, reach out to your designated Client Account Manager or Building Engines Support, for assistance.*

This section describes the process of adding charges to multiple entities on a single work order:

1. From within the work order, click either  or  to add a labor or material.
2. Use the provided fields to enter the relevant labor or material information.
3. Click **Billable**, and select a **BILL TO** entity.




4. Click **SAVE** or **SAVE AND ADD ANOTHER** to add additional billable labors or materials.
5. (Optional) Follow steps 1 – 4 to continue adding billable charges to a single work order.

Invoicing Multiple Entities from a Single Work Order (Split Billing)

Invoicing multiple entities from a single work order is no different than creating an invoice for a single entity. In this instance, a separate invoice is created for each entity and their associated charges. *Note: To enable the Split Billing configuration and to learn more about this feature, reach out to your designated Client Account Manager or Building Engines Support, for assistance.*

To invoice multiple entities from within a single work order:

1. Navigate to the **Labor and Materials** section.

2. Click the **Print Invoice**  icon and a separate invoice is generated for each entity associated to the work order.

Sharing a Work Order

You can create PDF of a work order and email it to a designated list of recipients using the Share functionality. This section describes the process of sharing a work order.

To share a work order:

1. Locate and open the work order.
2. Click **SHARE**.



The screenshot shows a work order interface for "Interior Lights - #288450772" under "Berkshire Crossing - BE Building Services". The interface includes a header with navigation icons, a main content area with details, and a bottom action bar. A red arrow points to the "SHARE" button in the action bar.

REQUESTED BY:		BUILDING:		CREATED:	
Rick Richards		Berkshire Crossing		12/08/2014 01:21 PM	
ASSIGNED TO:		TENANT:		ACKNOWLEDGED:	
Carl Dahl		BE Building Services		12/08/2014 01:21 PM	
ASSIGNED ON:		FLOOR:		ARRIVED:	
12/08/2014 01:21 PM		4		12/08/2014 01:22 PM	
ISSUE TYPE:		SUITE:		SERVICE LEVEL:	
Interior Lights		550		Priority 2	
FLAG:		LOCATION:		TARGET FOR OPEN:	
-- No Flag --		Lobby		12/08/2014 02:21 PM	
STATUS:				MUST COMPLETE BY:	
Open/On-Hold				TBD	

Details: Lights out in the lobby

REASSIGN ADD COMMENT RESOLVE HOLD SHARE PRINT


3. By default, the **Sender Alias**, **Subject**, and **Message** are auto-populated with work order-specific information. Clicking into any of these fields allows you to edit the information.
4. Select the recipients by clicking the **(+)** next to their name, or by manually adding their email into the **email address** field.
5. Click **Send**.

Linking a Work Order to a Piece of Equipment

You can link a work order back to a piece of building equipment if you are able to determine that a piece of equipment is responsible for the work needed on the work order.

To link a work order to a piece of equipment:

1. Locate and open the work order.

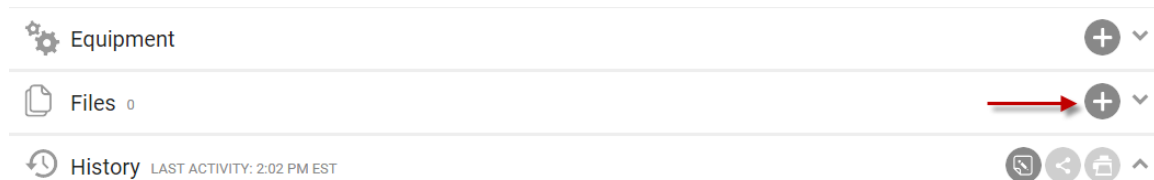
2. In the **Equipment** section, click .
3. Enter the name, serial number, or asset tag of the piece of equipment. As you type, the system auto-suggests possible equipment matches.
4. Using the **Problem** field, enter the reason for linking the work order to a piece of equipment.
5. Click **SAVE** to complete the linking, or **SAVE AND ADD ANOTHER** to link the work order to another piece of equipment.

Adding a File to a Work Order

You can attach electronic files, such as a PDF or a photo, to an existing work order. This section describes how to add an electronic file or photo to the work order.

To add a file:

1. Locate and open the work order.
2. In the **Files** section of the work order, click **(+)**.



3. Click **ADD FILES**, or drag and drop the file into the **Upload New File(s)** box.
4. (Optional) Click **Display to Tenants** to make the file appear on the tenant interface.
5. Click **SAVE**.

Adding a Comment to a Work Order

This section describes how to add a comment to an existing work order.

To add a comment to a work order:


1. Locate and open the work order.
2. Click **ADD COMMENT**.
3. Enter your comment into the **Add Comment** box.
4. (Optional) Click **Keep Comment Internal** to hide the comment from the tenant interface.

5. Click **SAVE**.

Adding Labor to a Work Order

You can add labor to a work order to track the amount of time spent on the work order or to bill back tenants for services you have provided.


To add labor to a work order:

1. Locate and open the work order.
2. Click the  icon located in the **Labor and Materials** section.
 - a. From the **NAME** drop down, select the name of the staff member or vendor who performed the labor.
 - b. Select the appropriate **LABOR RATE**.
 - c. Enter the labor **HOURS**.
 - d. (Optional) Select a **MARKUP**.
 - e. (Optional) Click **Billable** if this is a billable charge.
3. Click **SAVE** to add the labor or **SAVE AND ADD ANOTHER** to enter in additional charges.

Adding Materials to a Work Order

You can add materials to a work order to track the materials used to complete a work order or to bill back tenants.

To add a material to a work order:

1. Locate and open the work order.
2. Click the  icon within the **Labor and Materials** section.
 - a. (Optional) Select a category to narrow the list of materials.
 - b. Select the appropriate **MATERIAL**.
 - c. Enter the **QUANTITY** of material.
 - d. (Optional) Select a **MARKUP**.
 - e. (Optional) Click **Billable** if this is a billable charge.
3. Click **SAVE** to add the material or **SAVE AND ADD ANOTHER** to enter in additional charges.


Notifications

Notifications are system rules that control the routing protocols for work orders. These settings are an important part of the workflow for internal and external staff when handling service requests. Notifications control the conditions and delivery methods (email, text, fax, etc.) that inform staff and tenants of work order details and status updates.

Notification rules are configured by a System Administrator, and may be standard for all work order issue types or set up for individual issue types.

Creating a New Notification

This section describes the process of setting up work order notifications.


1. Navigate to **ADMIN → Notifications**.
2. Click .
3. Specify the **BUILDING, ISSUE TYPE, ON STATUS, RECIPIENT**, and **ACTION**.
 - a. **BUILDING** – select one building name from the dropdown menu. All notification rules are configured per building.
 - b. **ISSUE TYPE** – notifications may be configured for individual or groups of issue types, or for **All* issue types in a building. Selecting **Site Default* will apply the notification rule to any remaining issue types for a building after any other specific issue type notification rules have been created.
 - i. A custom selected list of issue types may be created by clicking the *Select Issue Type* link, and specifying each issue type to which the notification rule will apply.
 - c. **ON STATUS** – this setting establishes the status that will trigger the notification. For example, selecting *New* will trigger a notification when a work order is first submitted. Notification rules are configured separately for each status and for each person to whom the rule applies.
 - d. **RECIPIENT** – this setting specifies the employee, tenant or vendor to be notified when a status change occurs for the selected issue type(s). This setting may also trigger a notification to a generic role such as *Assignee* or *Tenant*.
 - e. **ACTION** – this setting specifies the delivery method for the notification:
 - i. *Assign To* – assigns the work order to the individual specified in **Recipient**.

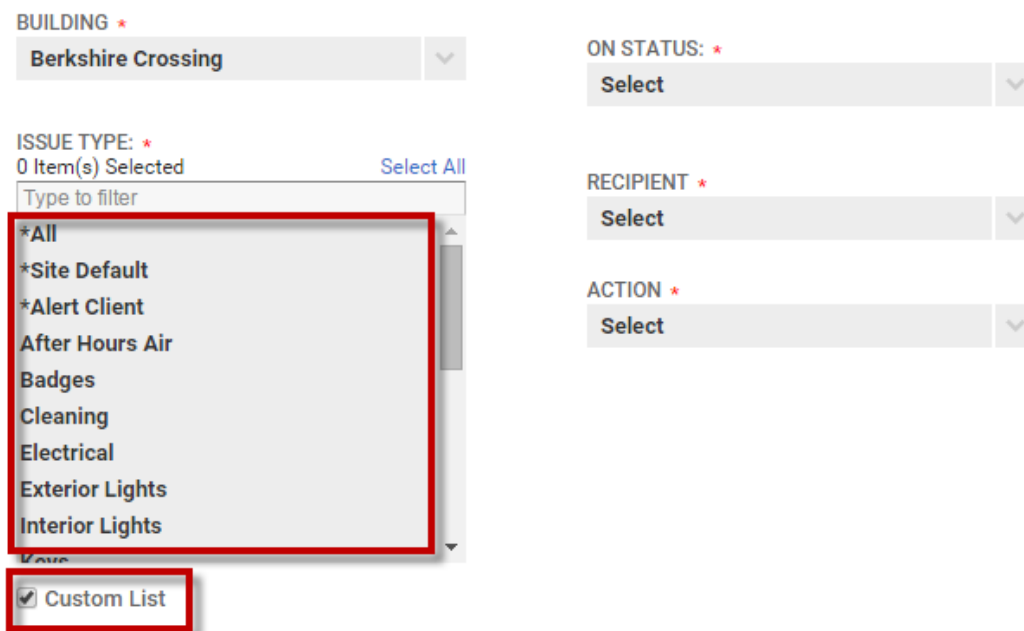
- ii. *Notify* – in order for SMS notification to deliver, the employee or tenant employee contact information must include the mobile phone number and the mobile carrier name.
4. Click **SAVE** to create the new notification.

Creating a Notification for Multiple Issue Types

Notifications that have the same Building, On Status, Recipient, and Action, can be configured with multiple issues types, thus saving you time from having to create a notification for each issue type.

To create a notification with multiple issue types:

1. Click **ADMIN → Notifications**.
2. Click .
3. Select a **BUILDING**.
4. Click **Custom List**, and select the **Issue Types** that make up the notification.



BUILDING *
Berkshire Crossing

ON STATUS: *
Select

ISSUE TYPE: *
0 Item(s) Selected
Type to filter
Select All

- *All
- *Site Default
- *Alert Client
- After Hours Air
- Badges
- Cleaning
- Electrical
- Exterior Lights
- Interior Lights

Custom List

RECIPIENT *
Select

ACTION *
Select

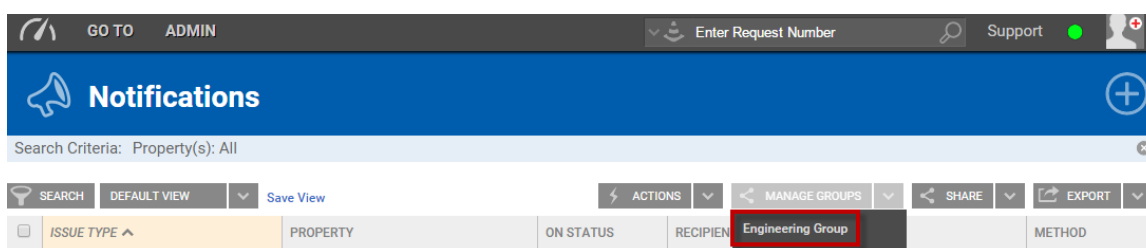
5. (Optional) Click **Select All** to include all Issue Types.
6. Select an **ON STATUS**, **RECIPIENT**, and **ACTION**, and click **SAVE**.

Managing Notification Groups

You can configure a designated group of staff to receive notification of new or unassigned work orders. Group members may be notified via email, SMS, fax or with a BE-Mobile App push notification. Optionally, you have the ability to send a follow up notification to this group once a work order has been assigned. *Note: By default, the Engineering Group is provided to every account. If you need additional groups created, reach out to your Client Account Manager for assistance.*

To create a notification group:

1. Click **ADMIN → Notifications**.
2. Hover over **MANAGE GROUPS** and select the group you want to edit.




3. Select group participants by clicking the **(+)** located next to their name.
4. When you are finished adding people to the group, click **Close**.

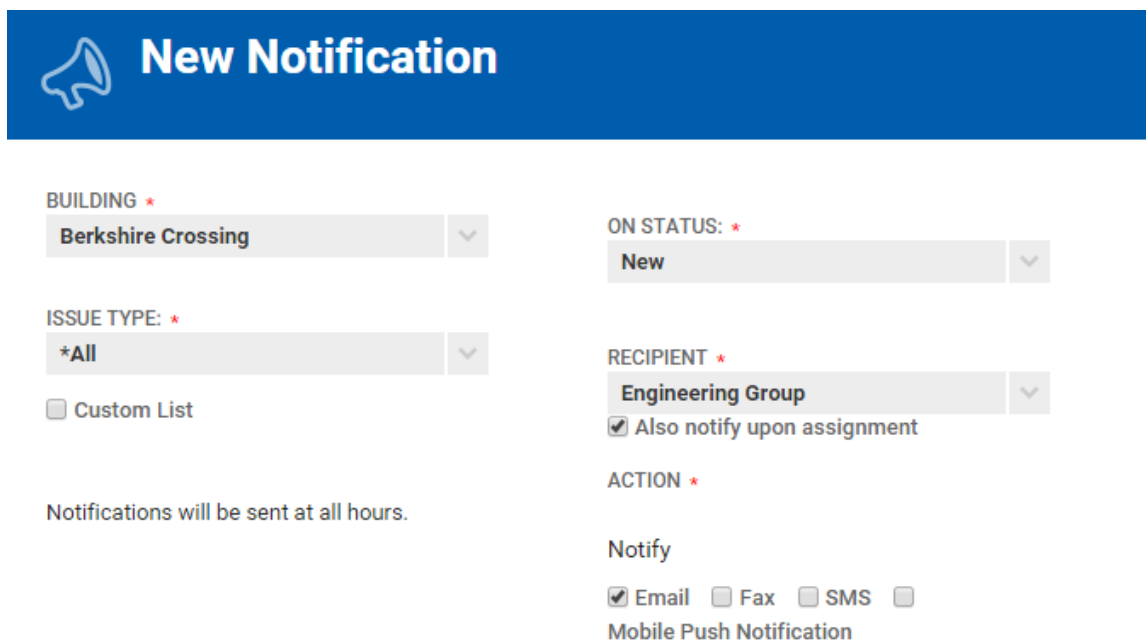
Creating a Group Dispatch Notification

This section describes how to create a group notification for the work orders module.

To create a group notification:

1. Click **ADMIN → Notifications**.
2. Click .
3. Specify the **BUILDING** and **ISSUE TYPE(s)**.
4. Select the **ON STATUS** to **New**.
5. Select the **RECIPIENT** to **Engineering Group**.
6. (Optional) Click **Also notify upon assignment** to notify group members once a work order has been assigned.

- Under **ACTIONS**, select the notification method(s). *Note: More than one method may be selected.* The following example is a group notification for all issue types.



The screenshot shows the 'New Notification' form. At the top is a blue header with a megaphone icon and the text 'New Notification'. Below this are several fields: 'BUILDING *' with a dropdown menu showing 'Berkshire Crossing'; 'ON STATUS: *' with a dropdown menu showing 'New'; 'ISSUE TYPE: *' with a dropdown menu showing '*All' and a checkbox for 'Custom List'; 'RECIPIENT *' with a dropdown menu showing 'Engineering Group' and a checkbox for 'Also notify upon assignment'; 'ACTION *' with a 'Notify' section containing checkboxes for 'Email' (checked), 'Fax', 'SMS', and 'Mobile Push Notification'.

- Click **SAVE**.

Deleting Notifications

This section describes the process of deleting notifications for the work order module.

To delete a notification:

- Click **ADMIN → NOTIFICATIONS**.
- Use the checkboxes on the left to select the specific notification(s) to be deleted.
- Hover over **ACTIONS** and select **DELETE**.

Suspending and Reactivating Notifications

If a staff member is on vacation or plans an extended leave of absence you can suspend the notification(s) that are linked to their name. This section describes how to suspend and reactivate notifications.

To suspend a notification:

- Click **ADMIN → NOTIFICATIONS**.

2. Navigate to the notification(s) you want to suspend and click the check box located to the left of it.
3. Hover over **ACTIONS** and select **Suspend**.
4. (Optional) To reactive the notification, navigate to the notification(s) you want to suspend and click the check box located to the left of it.
5. (Optional) Click **REACTIVATE**.

Building Settings

The building settings section allows you to access and manage your Building Connect webpage(s), Space Management, Bulk Updates, Issue specific Notes, PM Holds, Messages, and Meter Types. This section covers Bulk updates, Issue Specific Notes, Messages, and Meter types. Building Connect and Space Management can be found in their own respective sections.

Bulk Changes

Bulk Update allows you to modify the status of multiple Work Orders, Preventive Maintenance, or Reminder requests as a cleanup function. In all cases, any applicable rules that generally validate data before changing the status will NOT be applied when performing Bulk Updates.

To bulk change a status:

1. Click **Admin → Building Settings → Bulk Update**.
2. Select a **BUILDING** and **REQUEST TYPE**.
3. Select the current **STATUS** and **DATE RANGE** of the items you are updating.
4. Select a **MOVE TO STATUS**.
5. Provide a reason for the bulk update in the **ADD DETAILS** field, and click **UPDATE REQUESTS**.

Issue Specific Notes

This feature allows you to create work order specific messaging to your tenants. This message is displayed to tenants when they select a work order that has an issue specific note attached to it.

To create an issue specific note:

1. Click **Admin → Building Settings → Issue Specific Notes**.
2. Select the **BUILDING** and **ISSUE TYPE**.
3. Using the message field, enter the issue specific note, and click **SAVE**.

Messages

This feature allows you to create a Building Message to be displayed to all tenant users when accessing the Home page of Building Engines.

To create a message:

1. Click **Admin → Building Settings → Messages**.
2. Click the **(+)** icon.
3. Select a message **TYPE**.
 - a. **Standard message**: Standard messages are usually used to communicate non-critical communications.
 - b. **Emergency message**: Emergency messages are denoted with a red flag on the tenant interface. This message type should not be used for true building emergencies, but rather for important bulletins or announcements. When posting this type of message, you may indicate the date range during which it should display. Additionally, administrators can require an acknowledgement from the tenant that the message has been read upon logging in.
 - c. **Event message**: Event messages are used to remind tenants of an upcoming building event, and are only displayed for predetermined amount of time.
 - d. **Welcome message**: Welcome messages are used to communicate a welcome message or general information about the property. This message is displayed on the left side of the tenant home page below the building picture.
4. Select a **BUILDING(S)**.
5. Enter a **TITLE** and **MESSAGE**, and click **SAVE**.

Meter Types

This feature allows you to create new meters (as a component of certain Preventive Maintenance tasks). Individual meter types can be used to standardize required meter readings for the specific building equipment.

To create a meter type:

1. Click **Admin → Building Settings → Meter Types**.
2. Click the **(+)** icon.
3. Select a **BUILDING(S)**.

4. Enter a meter **NAME** (ex. Voltage, Amps. Etc.).
5. Enter an acceptable **MIN** and **MAX** reading.
6. Specify the **UNITS**.
7. (Optional) Click **Allow non-numeric** for the meter to accept values other than numbers.
8. Click **SAVE**.

Space Management

The Space Management module of Building Engines allows you to easily monitor and manage occupancy levels across multiple building or many regions. Using a grid view and Stack Plan of the property, Space Management provides increased visibility into building operations for tenant suites, non-tenant spaces such as mechanical and electrical rooms, and schedulable resources for employee and tenant events.

Viewing your Building's Stack Plan

This section describes how to locate and view your building's Stack Plan or building layout.


To locate your building's Stack Plan:

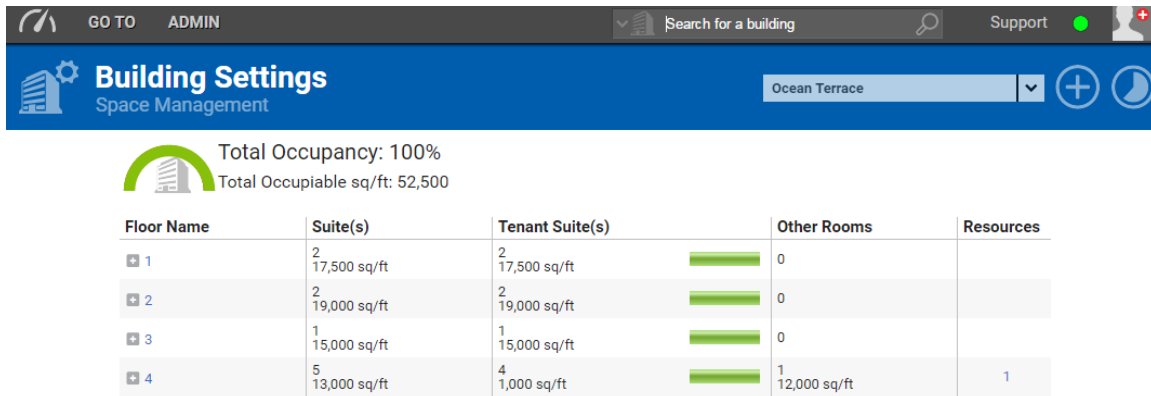
1. Click **Admin** → **Building Settings** → **Stack Plan**.
2. Select a building. Following your selection, your building's Stack Plan is displayed.

Space Management Dashboard

The Space Management Dashboard is the configurable end of a building's Stack Plan. Configurations done on this dashboard affect your building's occupancy rate, room types, square footage, and available resources. Edits made to the Space Management Dashboard are reflected on the Stack Plan.

To locate the Space Management Dashboard:

1. Click **Admin** → **Building Settings** → **Space Management**, or click the  located on the homepage.
2. Select a building. Following your selection, an editable version of your building's Stack Plan is displayed.



Types of Building Spaces

This section describes the types of building spaces that can be configured into a building's Stack Plan.

- **Tenant Suite** is a space reserved for a tenant. This space can be vacant or assigned to a specific tenant. Tenant suites cannot be made available for Resource Scheduling.
- **Common Area** is a building space that is accessible to all tenant companies in a building. These areas cannot be reserved through Resource Scheduling, however, all tenant in the building can submit a work order on behalf of the common area.
- **Tenant Common Area** is a building space that is accessible to specific tenant companies in a building. It cannot be reserved through Resource Scheduling, however, a tenant company with access to the space may submit a work order on behalf of the common area.
- **Meeting Area** or **Freight Area** are building resources than can be reserved, by designated employees and tenants, through the Resource Scheduling module.
- **Generator Rooms, Electrical Rooms, and Mechanical Rooms** are spaces that can be integrated into the Inspections module.

Creating a New Floor

This section describes the process of creating a new floor in your building.

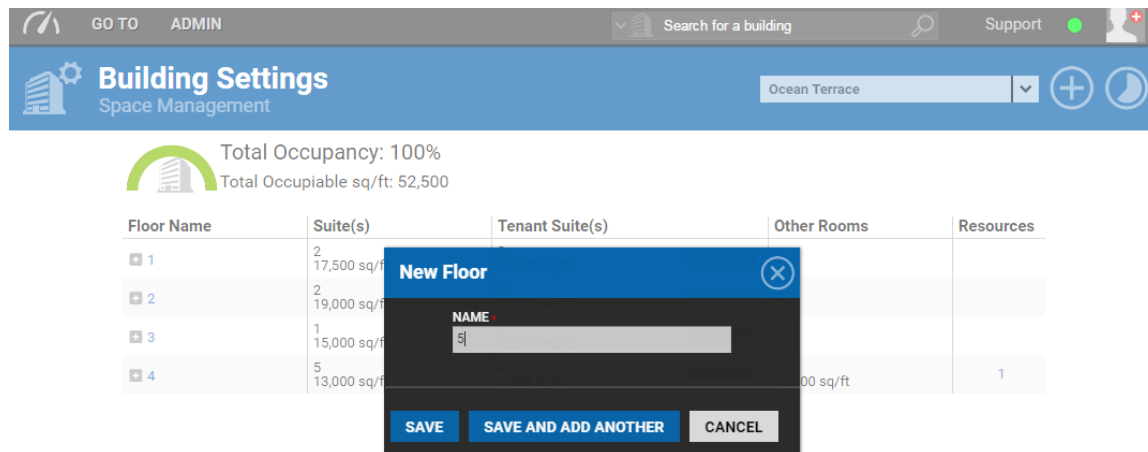
To create a new floor:

1. Click **Admin** → **Building Settings** → **Space Management**, or click the



located on the homepage.

2. Select a building.
3. Click  to add a floor.
4. Enter a floor **Name**, and click **SAVE** or **SAVE AND ADD ANOTHER**.





5. (Optional) Repeat steps 3-4 until all floors have been created.

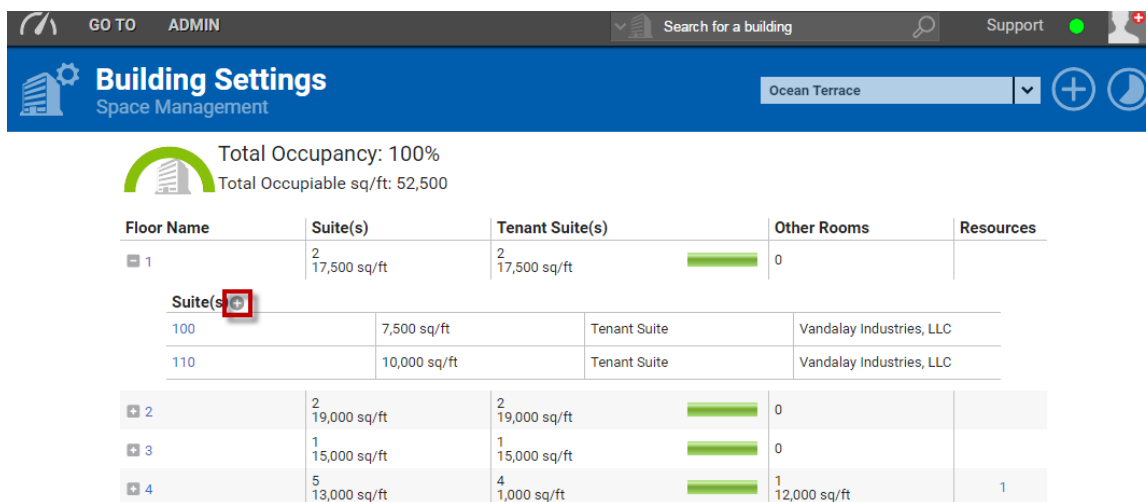
Creating a New Suite


This section describes how to create a new suite in your building. Suites can be designated as tenant occupied, vacant, bookable resources, or mechanical rooms.

To create a new suite:

1. Click **Admin** → **Building Settings** → **Space Management**, or click the  located on the homepage.
2. Select a building.
3. Click the  that corresponds to the floor you want to add a suite to.

4. Click the Add Suite icon .





Floor Name	Suite(s)	Tenant Suite(s)	Other Rooms	Resources
1	2 17,500 sq/ft	2 17,500 sq/ft	0	
	Suite(s) 			
	100	7,500 sq/ft	Tenant Suite	Vandalay Industries, LLC
	110	10,000 sq/ft	Tenant Suite	Vandalay Industries, LLC
2	2 19,000 sq/ft	2 19,000 sq/ft	0	
3	1 15,000 sq/ft	1 15,000 sq/ft	0	
4	5 13,000 sq/ft	4 1,000 sq/ft	1 12,000 sq/ft	1

5. Enter a suite **Name**.
6. (Optional) Enter the square footage.
7. Select the **SUITE TYPE**. *Note: Suite Types can be referenced in the **Types of Building Spaces** section. If the Tenant Suite option is selected, a **TENANT** field is displayed and you are given the ability to link the suite to an existing tenant.*
8. (Optional) If the suite can be divided into additional subsections, use the **SUITE LOCATIONS** field to enter those sections. *Note: If the **SUITE LOCATIONS** field is utilized, when you create a work order for this suite you are also provided these locations in the Location field.*

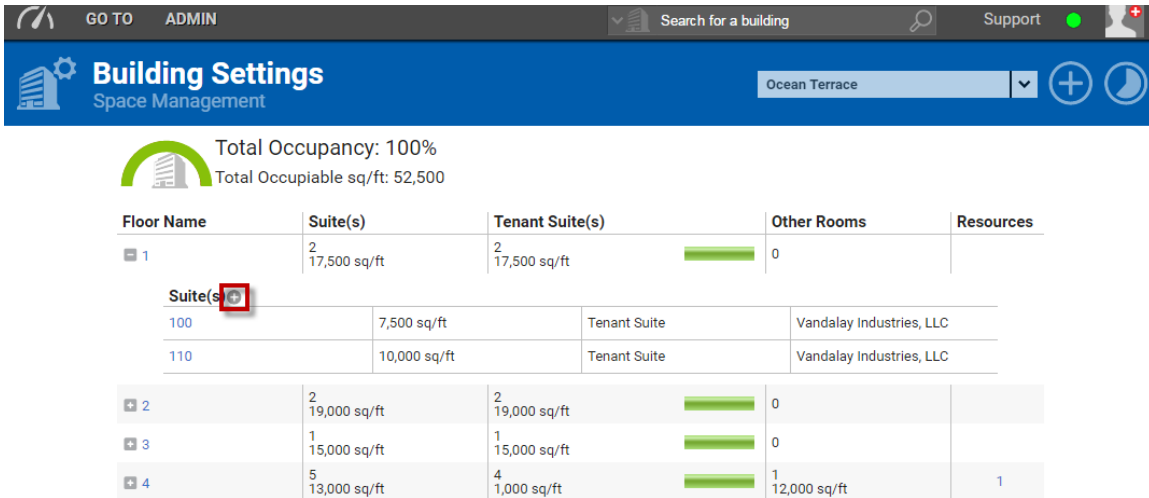
Creating a Bookable Resource


This section describes the process of creating a new bookable resource. Common examples of bookable resources include conference rooms, loading docks, and freight elevators.

To create a bookable resource:

1. Click **Admin** → **Building Settings** → **Space Management**, or click the  located on the homepage.
2. Select a building.
3. Click the  that corresponds to the floor you want to add a suite to.

4. Click the Add Suite icon .



Floor Name	Suite(s)	Tenant Suite(s)	Other Rooms	Resources
1	2 17,500 sq/ft	2 17,500 sq/ft	0	
Suite(s) 				
100	7,500 sq/ft	Tenant Suite	Vandalay Industries, LLC	
110	10,000 sq/ft	Tenant Suite	Vandalay Industries, LLC	
2	2 19,000 sq/ft	2 19,000 sq/ft	0	
3	1 15,000 sq/ft	1 15,000 sq/ft	0	
4	5 13,000 sq/ft	4 1,000 sq/ft	1 12,000 sq/ft	1

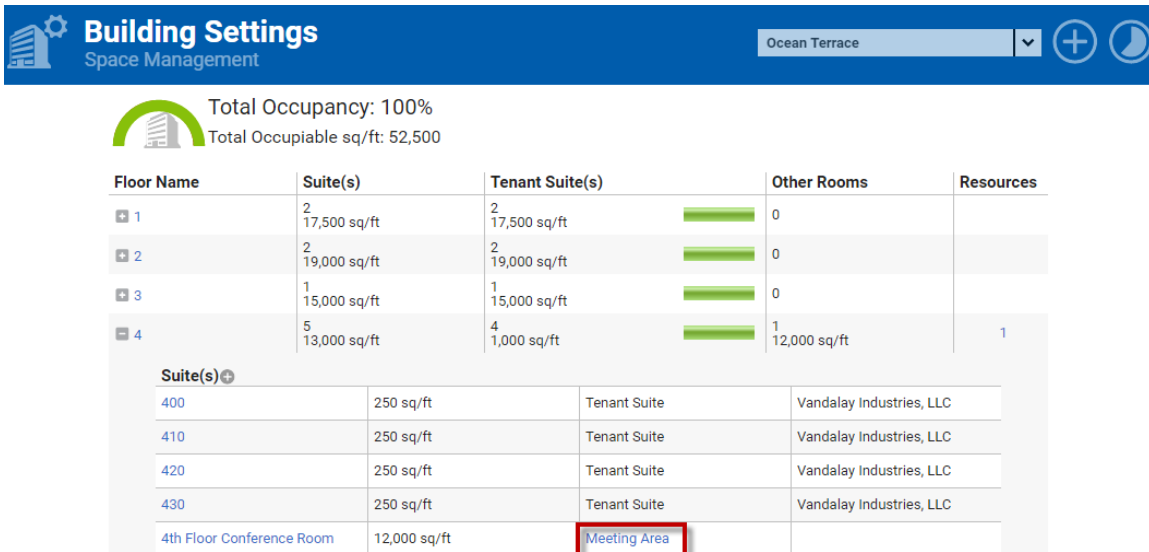
5. Enter the Resource **Name**.


6. (Optional) Enter the square footage.

7. Select the room type as **Meeting Area** or **Freight Area**.

8. Click **SAVE**.

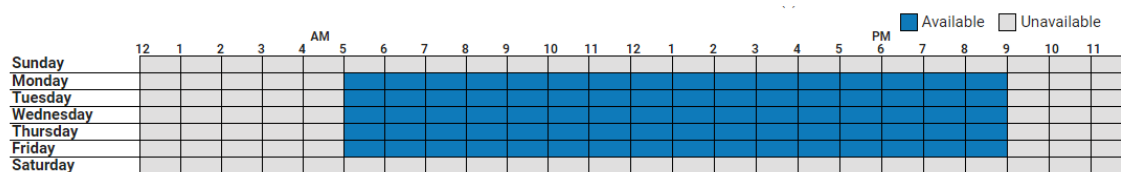
9. After the resource has been saved, click the hyperlinked **Meeting Area** or **Freight Area**.



Floor Name	Suite(s)	Tenant Suite(s)	Other Rooms	Resources
1	2 17,500 sq/ft	2 17,500 sq/ft	0	
2	2 19,000 sq/ft	2 19,000 sq/ft	0	
3	1 15,000 sq/ft	1 15,000 sq/ft	0	
4	5 13,000 sq/ft	4 1,000 sq/ft	1 12,000 sq/ft	1
Suite(s) 				
400	250 sq/ft	Tenant Suite	Vandalay Industries, LLC	
410	250 sq/ft	Tenant Suite	Vandalay Industries, LLC	
420	250 sq/ft	Tenant Suite	Vandalay Industries, LLC	
430	250 sq/ft	Tenant Suite	Vandalay Industries, LLC	
4th Floor Conference Room	12,000 sq/ft	Meeting Area		

10. Click **This resource can be reserved** option.

11. Using the Availability grid, select the hours that the resource is available for reservation.



12. The following settings are optional:

- Max Capacity, Photo, and Description:** These details are displayed to tenants when they make a reservation request.
- Amenities:** Add amenities to allow tenants to select from a list of items when booking a resource. These may carry associated costs, or be complimentary. Amenities marked as required will be added to every reservation for the resource.
- Prevent Tenants from Reserving this Resource:** This option only allows employees of the Property Management Company to book the resource.
- Auto Approve Reservations:** Reservations made for this resource are automatically moved to the Approved status as long as the space is available during the requested time.
- Create Work Order to Manage Tasks and Billing:** This option automatically creates a work order to manage the tasks and charges associated with a resource reservation. System Administrators can designate when work orders are created in relation to the date of the reservation.
- This resource has a billable cost:** This setting allows an hourly rate to be designated for the resource. Resources with a billable rate automatically generate a work order with the associated charge. All room fees are calculated on an hourly basis. Optionally, a Daily Rate Cap may be entered, which represents the largest possible fee for reserving a resource for an entire day.


13. Click **SAVE** to finish creating the resource.

Changing the Primary Suite of a Tenant Company

This section describes the process of changing the primary suite for an active tenant.

To change the primary suite:


- Clicking **Admin → Tenants → Companies**.


2. Use the **SEARCH** button and/or column filters to locate the tenant.
3. Click the tenant **COMPANY** name.
4. Click the **SUITES** tab.
5. Click .
6. Select a new **SUITE** and click **SAVE**.




Moving the Location of an Existing Floor


This section describes the process of moving the location of an existing floor within your Stack Plan.

To move the location of a floor:

1. Click **Admin** → **Building Settings** → **Space Management**, or click the  located on the homepage.
2. Select a building.
3. Place your cursor on the Stack Plan, left click, and perform a drag and drop to move the floor up or down on the list.


Building Settings
 Space Management

Ocean Terrace
 





 Total Occupancy: 100%
 Total Occupiable sq/ft: 52,500


Floor Name	Suite(s)	Tenant Suite(s)	Other Rooms	Resources
1	2 17,500 sq/ft	2 17,500 sq/ft	0	
2	19,000 sq/ft	19,000 sq/ft	0	
3	1 15,000 sq/ft	1 15,000 sq/ft	0	
4	5 13,000 sq/ft	4 1,000 sq/ft	1 12,000 sq/ft	1


Moving the Location of an Existing Space




This section describes the process of moving the location of an existing suite or space within your Stack Plan.


To move the location of a space:






1. Click **Admin** → **Building Settings** → **Space Management**, or click the  located on the homepage.
2. Select a building.

3. Click the  that corresponds with the floor where the suite is located.
4. Place your cursor on the Stack Plan, left click, and perform a drag and drop to move the suite up or down on the list.


Building Settings
 Space Management

Ocean Terrace
 






 Total Occupancy: 100%
 Total Occupiable sq/ft: 52,500

Floor Name	Suite(s)	Tenant Suite(s)	Other Rooms	Resources
1	2 17,500 sq/ft	2 17,500 sq/ft		0
Suite(s) 				
	100 7,500 sq/ft	Tenant Suite		Vandalay Industries, LLC
	110 10,000 sq/ft	Tenant Suite		Vandalay Industries, LLC
2	2 19,000 sq/ft	2 19,000 sq/ft		0
3	1 15,000 sq/ft	1 15,000 sq/ft		0
4	5 13,000 sq/ft	4 1,000 sq/ft		1 12,000 sq/ft

Editing an Existing Space

This section describes the process of editing an existing suite or space within your Stack Plan.

To edit a space:

1. Click **Admin** → **Building Settings** → **Space Management**, or click the  located on the homepage.
2. Select a building.
3. Click the  that corresponds with the floor where the suite is located.
4. Click the hyperlinked suite name.



5. Using the pop up box, make your edits, and click **SAVE**.

The screenshot shows the 'Building Settings' interface for 'Space Management'. At the top, there's a header with a building icon, the title 'Building Settings', and a dropdown menu set to 'Ocean Terrace'. Below the header, a green progress bar indicates 'Total Occupancy: 100%' and 'Total Occupiable sq/ft: 52,500'. The main area contains a table with columns 'Floor Name' and 'Suite(s)'. The table lists floors 1 through 4, with floor 4 expanded to show individual suites (430, 420, 410, 400, and 4th Floor Conference Room) and their respective square footages. An 'Edit Suite' modal is open, displaying fields for 'NAME' (420), 'SQ/FT' (250), 'SUITE TYPE' (Tenant Suite), 'SUITE LOCATIONS' (two empty text boxes), and 'TENANT' (Vandalay Industries, LLC). The modal has 'SAVE', 'DELETE', and 'CANCEL' buttons at the bottom. To the right of the modal, there are columns for 'Other Rooms' and 'Resources'.

Deleting an Existing Space

This section describes the process of deleting an existing suite or space within your Stack Plan.

To delete a space:

1. Click **Admin** → **Building Settings** → **Space Management**, or click the  located on the homepage.
2. Select a building.
3. Click the  that corresponds with the floor where the suite is located.
4. Click the hyperlinked suite name.

5. Using the pop up box, click **DELETE**.

The screenshot shows the 'Building Settings' interface for 'Space Management' at 'Ocean Terrace'. It displays a table of suites with columns for Floor Name, Suite(s), and sq/ft. A modal window titled 'Edit Suite' is open, showing fields for NAME (420), SQ/FT (250), SUITE TYPE (Tenant Suite), SUITE LOCATIONS, and TENANT (Vandalay Industries, LLC). The modal has three buttons at the bottom: SAVE, DELETE (highlighted with a red box), and CANCEL.

Floor Name	Suite(s)	sq/ft
1	2	17,500 sq/ft
2	2	19,000 sq/ft
3	1	15,000 sq/ft
4	5	13,000 sq/ft

Suite(s)	sq/ft
430	250 sq
420	250 sq
410	250 sq
400	250 sq
4th Floor Conference Room	12,000

Other Rooms	Resources
0	
0	
0	
1	1
12,000 sq/ft	

Broadcast Messaging

The Broadcast module provides an easy and effective method of messaging property management personnel, tenants, and vendors. Optionally, the Broadcast module can be integrated with Send Word Now to provide an emergency broadcast and accountability tool. Both types of Broadcast messaging provide previous message information, dates and times messages were sent, and a recipient list. If an emergency broadcast is sent you are also provided a dashboard with each recipient's response.

Sending a Broadcast Message

Broadcast messaging allows you to send messages to recipients in and out of the system. This section describes the process of creating a broadcast message and adding recipients.

To create a broadcast message:

1. Click **Go To → Broadcast Messaging → Create Message**.
2. Enter a **SUBJECT**.

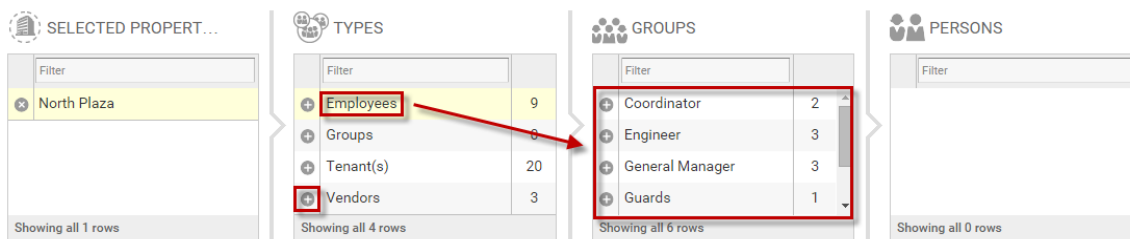
3. Enter your message into the **MESSAGE** field.

4. By default, the **SENDER ALIAS** is populated with your name. *Note: If you want a different alias, enter a new name or entity into the **SENDER ALIAS** field.*
5. Using the **OPTIONS** field, select how the message will be delivered.
6. (Optional) Click **Enable Read Receipt** to receive a confirmation for each recipient that opens the message.
7. (Optional) To attach a file to your broadcast message:
 - a. Click **UPLOAD FILES**.
 - b. Select a file to be attached to the broadcast message.
 - c. Click **ADD FILES**.
8. Select the **PROPERTY(s)** that the message is going to. *Note: You can also begin sorting by **ADDRESS**, **CITY**, or **STATE**.*

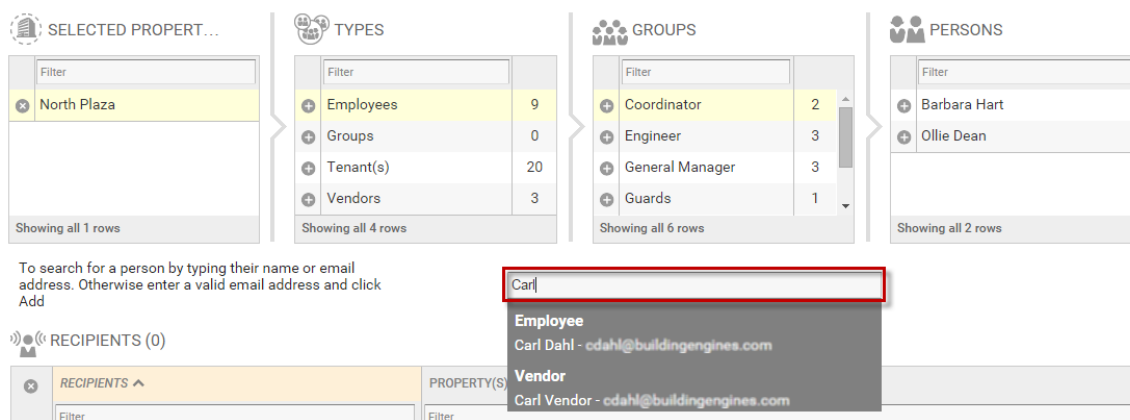
PROPERTY(S)

PROPERTY ^	ADDRESS	CITY	STATE
Filter	Filter	Filter	Filter
All Property(s)			
North Plaza	100 North Street	Boston	MA
South Plaza	100 South Street	Boston	MA
Showing all 4 rows			

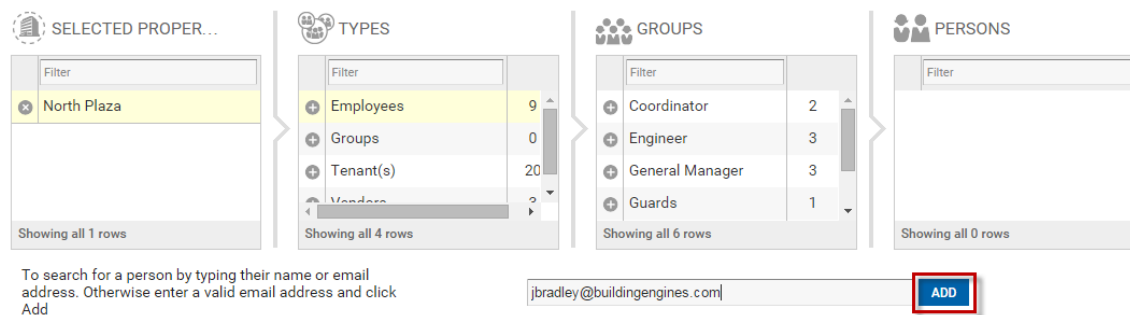
9. After a property is selected, user **TYPES** are displayed. Click the **(+)** to add all users from that type or click the **TYPE** name to expand the further. Continue filtering by **GROUP** or **PERSONS** until you finish adding recipients to a message.



10. (Optional) Click the **Name or Email** field, and enter either the name or the email of the person you want to message. Names or email addresses already in the system are displayed as an option to choose from. If the name displayed is a correct match, click the name to add the person to the recipient list.



11. (Optional) To add a recipient that is not already in the system, click the **Name or Email** field and enter the email address you want to message. If the email address is not currently in the system, the **ADD** button will appear. Click **ADD** to add them to the recipient list.



12. (Optional) To remove a recipient, click the **(X)** located to the left of their name in the **RECIPIENTS** field.

13. Click **SEND** to send the message.

Sharing a List of Broadcast Messages

A list of Broadcast messages can be sent to recipients in and out of the system. This section describes the process of sending a list of Broadcast messages.

To send a list of Broadcast messages:

1. Click **Go To → Broadcast Messaging → Message Dashboard**.
2. (Optional) Use the **SEARCH** to filter the list of Broadcast messages being sent.
3. Click **SHARE** and select a format type. *Note: If CSV or XLS is selected you have the option of sharing all column data or only the columns currently displayed on the dashboard.*
4. Select your recipients and click **SEND**.

Exporting a Broadcast Message List

A list of Broadcast messages can be exported from the message dashboard. This section describes the process of exporting a list of Broadcast messages.

To export a list of Broadcast messages:

1. Click **Go To → Broadcast Messaging → Message Dashboard**.
2. (Optional) Use the **SEARCH** to filter the list of Broadcast messages being exported.
3. Click **EXPORT** and select a format type. *Note: If CSV or XLS is selected you have the option of exporting all column data or only the columns currently displayed on the dashboard.* Exports appear at the bottom of the browser once they have finished exporting.

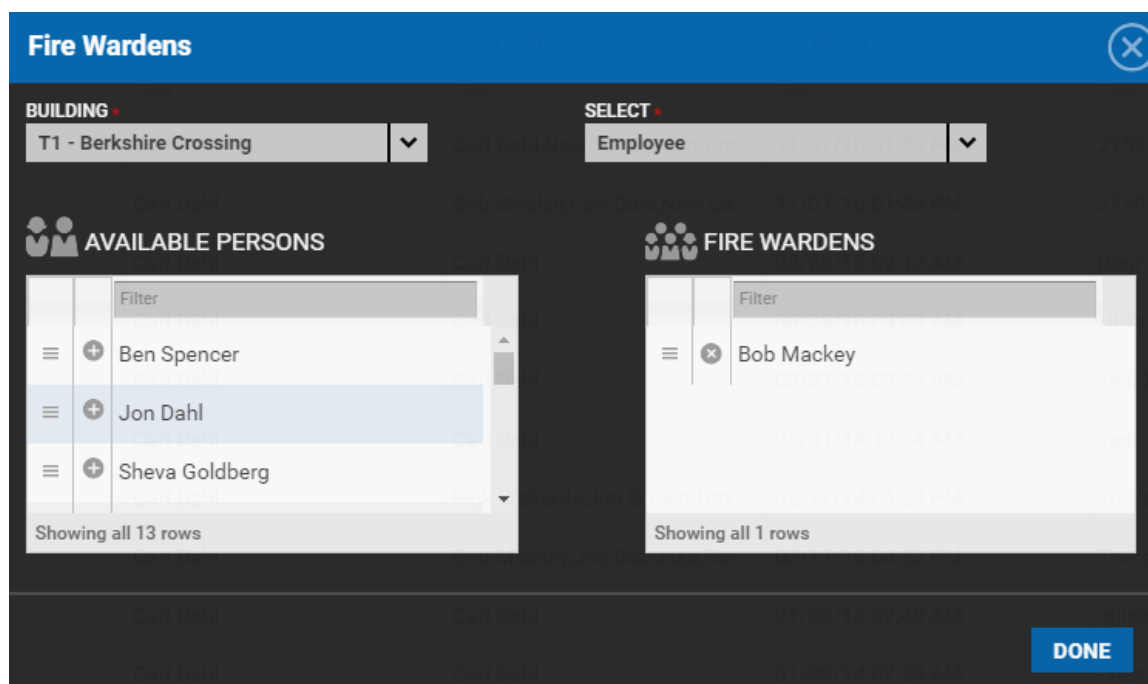
Managing Broadcast Groups

Broadcast and Emergency Broadcast messages can be sent to specific groups of people. This section describes the process of managing your Broadcast groups.

To manage a Broadcast group:

1. Click **Go To → Broadcast Messaging → Message Dashboard**.
2. Click **GROUPS** and select the group you want to edit.
3. Select a **BUILDING** and user type.

- (Optional) To add users to the group, click the **(+)** located next to the user's name, or drag and drop the name from the **AVAILABLE PERSONS** column to the group column.



- (Optional) To remove users from the group, click the **(X)** located next to the user's name.
- Click **DONE** to finish.

Broadcast Message Dashboard

The Broadcast Message Dashboard is an aggregation of all previously sent Broadcast messages. Using the Message Dashboard, you can view when a message was sent, its contents, and the recipients. You can also use the Message Dashboard to resend a previously sent message.

GO TO

ADMIN

Enter Request Number

Support

Message Dashboard

Search Criteria: Building(s): 123456 - 35 Main Street...3 more > and 1 other(s)

SEARCH




DEFAULT VIEW

Save View

GROUPS

SHARE

EXPORT

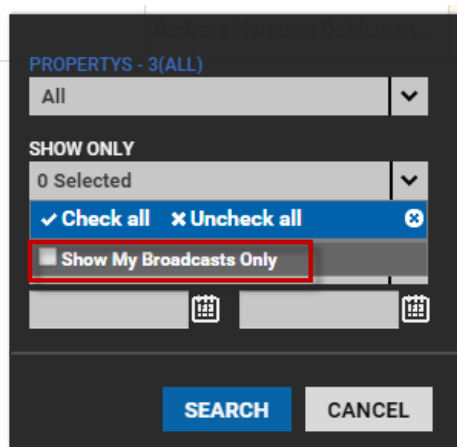
	TYPE	SUBJECT ^	SENT BY	RECIPIENTS	DATE SENT	MESSAGE BODY
	Filter	Filter	Filter	Filter	Filter	Filter
		Broadcast	Carl Dahl	Rick Richards,QA Test Em...	11/02/16 10:39 AM	Test
		Ice Cream Social	Carl Dahl	Bob Mackey,Joe Giaruss...	02/17/14 04:22 PM	There will be an ice crea...
		Ice Cream Social	Carl Dahl	Joe Giarusso,Kevin Totte...	10/03/13 11:24 AM	There will be an ice crea...

Locating a Previously Sent Broadcast Message

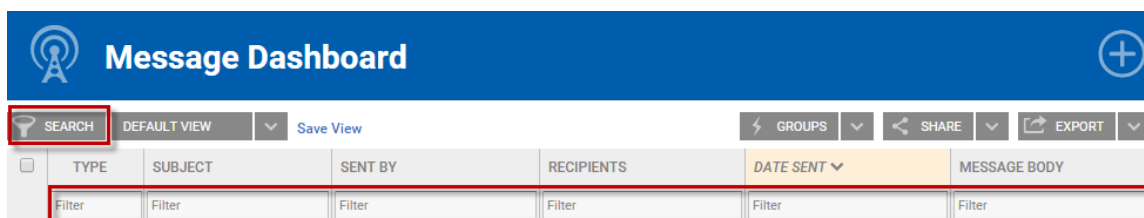
This section describes how to locate a previously sent broadcast message.

To locate a previously sent message:

1. Click **Go To → Broadcast Messaging → Message Dashboard**.
2. By default, only the messages you have sent are displayed. To view broadcast messages sent from other users:
 - a. Click **SEARCH**.
 - b. Click the **SHOW ONLY** field and unselect **Show My Broadcasts Only**.



- c. Click **SEARCH**.
3. Search for the broadcast message you want to view using the **SEARCH** button and/or column filters.



4. Click the message name in the **SUBJECT** field to access the message.

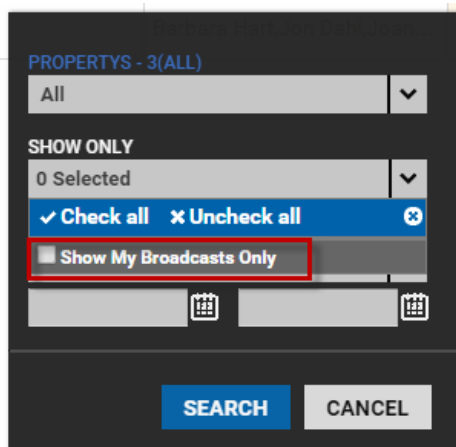
Resending a Broadcast message

This section describes how to resend a previously sent broadcast message.

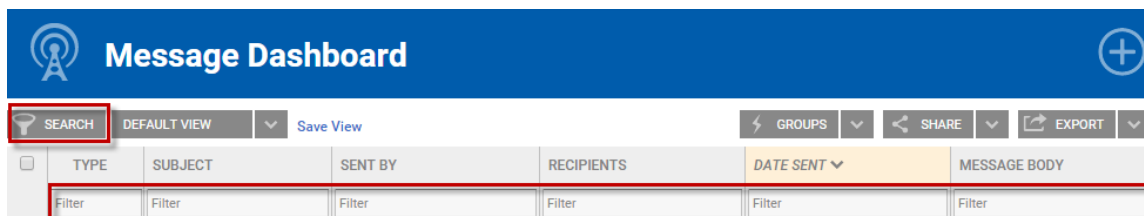
To resend a previously sent Broadcast message:

1. Click **Go To → Broadcast Messaging → Message Dashboard**.
2. By default, only the messages you have sent are displayed. To view broadcast messages sent from other users:

- a. Click **SEARCH**.
- b. Click the **SHOW ONLY** field and unselect **Show My Broadcasts Only**.



- c. Click **SEARCH**.
3. Search for the broadcast message you want to resend using the **SEARCH** button and/or column filters.



4. Click the **SUBJECT** name to access the message.
5. (Optional) By default, the broadcast message contents are displayed as they were when the original message was sent. To make edits, click the desired field and edit to your preference.
6. Click **RESEND**.

Emergency Broadcast Messaging

The Broadcast module can be integrated with Send Word Now to provide an emergency broadcast and accountability tool. When enabled, you are provided with additional message delivery methods, quick select responses, and a response dashboard for auditing message recipients. This section describes how to send emergency Broadcast messages and track recipient responses.

Sending an Emergency Broadcast Message

Emergency broadcast messaging allows you to send urgent and important messages to system users. This section describes the process of creating an emergency broadcast message and tracking recipient responses.

To create an emergency broadcast message:

1. Click **Go To → Broadcast Messaging → Create Emergency Message**.
2. Enter a **SUBJECT** name.
3. Using the **MESSAGE** field, enter a new message or select a pre-drafted message from the **EMAIL TEMPLATE**.
4. (Optional) To request and track recipient responses, select **Ask for responses** and then enter response options in the **Emergency Response(s)** fields.

5. By default, the **SENDER ALIAS** is populated with your name. *Note: If you want a different alias, enter a new name or entity into the **SENDER ALIAS** field.*
6. Using the **OPTIONS** field, select how the message will be delivered. *Note: Sending an emergency message in a format that is not utilized by a system user will result in a delivery failure. For example, if you send a message by fax and the user does not have a fax number associated to their user record, the user will not receive the message.*

Messages can be sent via:

- a. Email or Alt Email
- b. Fax
- c. SMS (text message) *Note: A system user **MUST** have a mobile number and cellular provider listed on their user record to receive an SMS message.*
- d. Phone, Mobile, Alt Mobile – When this option is selected, Send Word Now calls the phone, mobile or alt mobile phone number listed on the user record and a computer generated voice dictates the subject, message, and response options.

7. Select the **PROPERTY(s)** that the message is going to. *Note: You can also begin sorting by **ADDRESS**, **CITY**, or **STATE**.*

PROPERTY(S)

PROPERTY ^	ADDRESS	CITY	STATE
Filter	Filter	Filter	Filter
All Property(s)			
North Plaza	100 North Street	Boston	MA
South Plaza	100 South Street	Boston	MA

Showing all 4 rows

8. After a property is selected, user **TYPES** are displayed. Click the **(+)** to add all users from that type or click the **TYPE** name to expand the further. Continue filtering by **GROUP** or **PERSONS** until you finish adding recipients to a message.

<p>SELECTED PROPERTY...</p> <p>Filter</p> <p>North Plaza</p> <p>Showing all 1 rows</p>	<p>TYPES</p> <p>Filter</p> <p>Employees 9</p> <p>Groups 0</p> <p>Tenant(s) 20</p> <p>Vendors 3</p> <p>Showing all 4 rows</p>	<p>GROUPS</p> <p>Filter</p> <p>Coordinator 2</p> <p>Engineer 3</p> <p>General Manager 3</p> <p>Guards 1</p> <p>Showing all 6 rows</p>	<p>PERSONS</p> <p>Filter</p> <p>Showing all 0 rows</p>
--	--	---	--

9. (Optional) Click the **Name or Email** field, and enter either the name or the email of the person you want to message. Names or email addresses already in the system are displayed as an option to choose from. If the name displayed is a correct match, click the name to add the person to the recipient list.

<p>SELECTED PROPERTY...</p> <p>Filter</p> <p>North Plaza</p> <p>Showing all 1 rows</p>	<p>TYPES</p> <p>Filter</p> <p>Employees 9</p> <p>Groups 0</p> <p>Tenant(s) 20</p> <p>Vendors 3</p> <p>Showing all 4 rows</p>	<p>GROUPS</p> <p>Filter</p> <p>Coordinator 2</p> <p>Engineer 3</p> <p>General Manager 3</p> <p>Guards 1</p> <p>Showing all 6 rows</p>	<p>PERSONS</p> <p>Filter</p> <p>Barbara Hart</p> <p>Ollie Dean</p> <p>Showing all 2 rows</p>
--	--	---	--

To search for a person by typing their name or email address. Otherwise enter a valid email address and click Add

RECIPIENTS (0)

RECIPIENTS ^	PROPERTY(S)
Filter	Filter

Employee
Carl Dahl - cdahl@buildingengines.com

Vendor
Carl Vendor - cdahl@buildingengines.com

- 10.(Optional) To add a recipient that is not already in the system, click the **Name or Email** field and enter the email address you want to message. If the email address is not currently in the system, the **ADD** button will appear. Click **ADD** to add them to the recipient list.

The screenshot displays the recipient selection interface with four panels: 'SELECTED PROPER...', 'TYPES', 'GROUPS', and 'PERSONS'. The 'TYPES' panel is active, showing a list of categories with counts. Below the panels is a search instruction and an email input field with an 'ADD' button.

Panel	Item	Count
TYPES	Employees	9
	Groups	0
	Tenant(s)	20
	Vendors	3
GROUPS	Coordinator	2
	Engineer	3
	General Manager	3
	Guards	1

To search for a person by typing their name or email address. Otherwise enter a valid email address and click Add

ADD

- 11.Click **SEND** to send the emergency message.

Tracking Emergency Broadcast Responses

Following the submission of an emergency broadcast, and if you requested recipient responses, you are directed to the Emergency Broadcast Response Page. The Emergency Broadcast Response Page provides a list of every recipient, their delivery format(s), and response.

The **CURRENT RESPONSES** section provides a high level tally of responses while the recipient grid provides each individual response and delivery method.

Along with a **NAME**, **RESPONSE**, and **FORMAT**, you are also provided a response status for each recipient. The following are potential recipient statuses:

- Pending:** The application is still waiting for a response.
- Action Required:** The message was not delivered due to inaccurate contact information (i.e. a bad email address)
- Answered:** The recipient has responded.

The screenshot displays the 'Emergency Broadcast Messaging' interface. At the top, there's a navigation bar with 'GO TO ADMIN', a search bar for 'Enter Request Number', and a 'Support' link. Below this, a red header bar contains the title 'Emergency Broadcast Messaging' and a sub-header 'Alert this is an emergency notification!'. To the right of the header is a circular icon with a person and a counter showing '1' and '21'.

Below the header, there's a summary section with the following details:

- SENT:** 11/07/2016 3:56 PM EST
- SUBJECT:** Alert this is an emergency notification!
- BY:** Building Engines
- MODALITY:** Email, SMS
- STATUS:** Sent

A red box highlights the 'CURRENT RESPONSES' section, which shows a tally of responses:

CURRENT RESPONSES	
NOT RESPONDED:	1
YES I AM IN MY TENANT SUITE	4
NO I AM NOT IN THE BUILDING	6

Below the summary, a message states: 'There is an emergency situation unfolding outside of the property. Please shelter in place until further notice. Please respond Message: indicating if you are in your tenant space.'

The bottom section is a table with four columns: NAME, RESPONSE, EMAIL, and SMS. The table is filtered to show recipients who have responded. The table is highlighted with a red border.

NAME	RESPONSE	EMAIL	SMS
Filter	Filter		
Dan Boldyrev	No I am not in the building	✓	✓
Jacqui Finn	No I am not in the building	✓	✓
Jim Doucette	Yes I am in my tenant suite	✓	✓
John Chong	No I am not in the building	✓	✗
Michael Neisius	No I am not in the building	✓	✓
Nik Silveira	No I am not in the building	✓	✓
Pat O'Connor	Yes I am in my tenant suite	✓	✓

Resource Scheduling

Resource Scheduling allows you and your tenants to reserve meeting areas and other space resources through an interactive calendar that includes detailed availability descriptions. This module functions through bookable resources that are configured within Space Management.

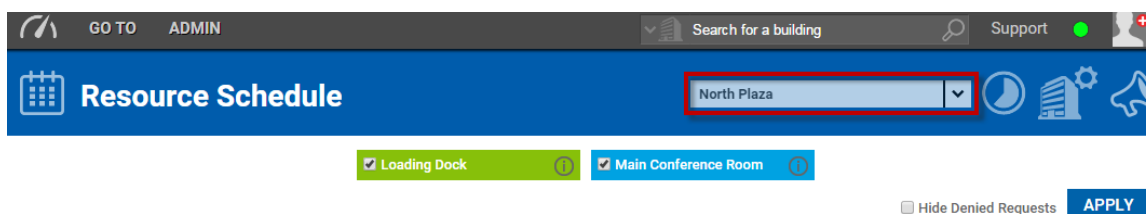
Property Managers may control advanced registration rules, configure settings for individual spaces, approve reservations, and manage resource tasks and tenant billing.

Viewing Bookable Resources

This section describes how to locate your bookable resources and view their availability.

To locate the bookable resources in a building:

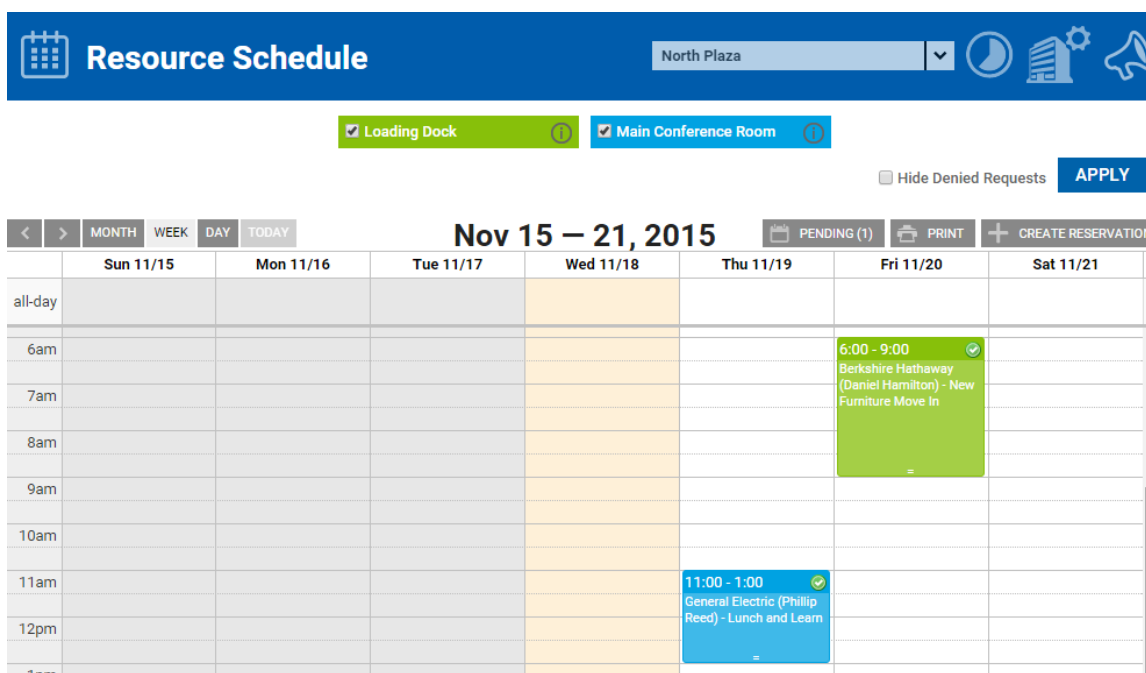
1. Click **Go To → Resource Schedule → Resource Schedule Calendar**.
2. Select a building.



3. Building Resources are displayed across the top of the calendar.

To view resource availability:


1. Click **Go To → Resource Schedule → Resource Schedule Calendar**.
2. Select a building.
3. Use the calendar to view Resource availability.

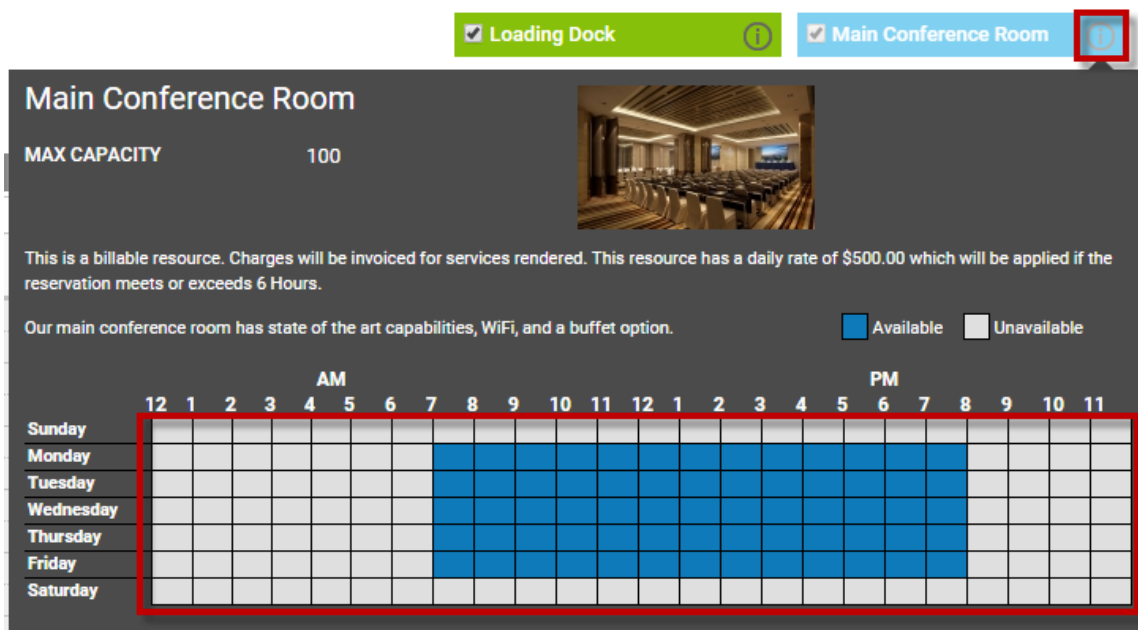


Creating a Single Reservation

You can book a resource for yourself or on behalf of a tenant. This section describes the process of creating a one-time reservation.

To book a reservation for yourself or on behalf of a tenant:

1. Click **Go To → Resource Schedule → Resource Schedule Calendar**.
2. Select a building.
3. Click either  **CREATE RESERVATION** or click on the calendar to open up the resource reservation form.
4. Select a **RESOURCE, STATUS, REQUESTER, EVENT NAME, EVENT TYPE** as **Single**, and a **START** and **END time**. *Note: To check Resource availability, hover over the (i) located in the Resource legend.*



Main Conference Room

MAX CAPACITY 100

This is a billable resource. Charges will be invoiced for services rendered. This resource has a daily rate of \$500.00 which will be applied if the reservation meets or exceeds 6 Hours.

Our main conference room has state of the art capabilities, WiFi, and a buffet option.

Available Unavailable

	12	1	2	3	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6	7	8	9	10	11
Sunday																								
Monday																								
Tuesday																								
Wednesday																								
Thursday																								
Friday																								
Saturday																								


5. Either click **Save** to add the request to Pending Requests, or click **Approve** to save and approve the request.

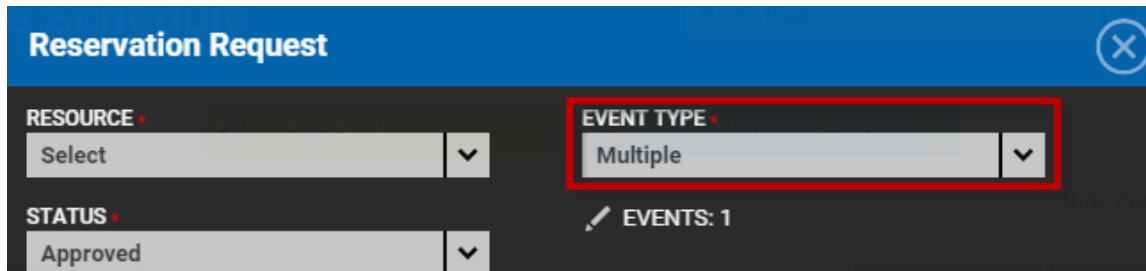
Creating Multiple Reservations

You can book a resource for yourself or on behalf of a tenant. This section describes the process of creating a one-time reservation.

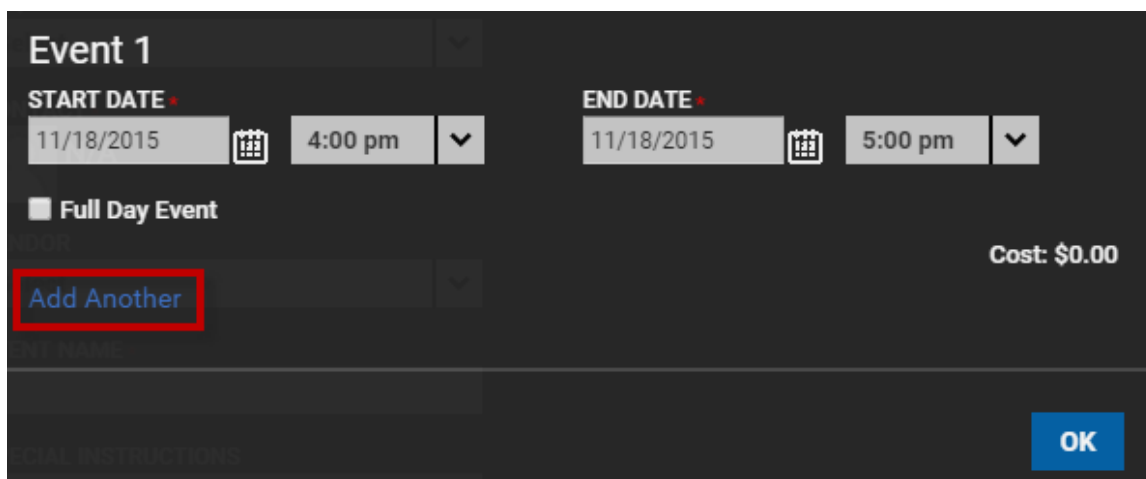
To book multiple reservations for yourself or on behalf of a tenant:


1. Click **Go To → Resource Schedule → Resource Schedule Calendar**.
2. Select a building.

3. Click either  **CREATE RESERVATION** or click on the calendar to open up the resource reservation form.
4. Select a **RESOURCE**, **STATUS**, **REQUESTER**, **EVENT NAME**, and **EVENT TYPE** as **Multiple**.



5. Select a **START DATE**, **END DATE**, and click **Add Another**. Continue clicking **Add Another** until all event are entered.




6. Click **OK** to finish entering events.
7. Click **SAVE** to finalize the Resource request.
8. (Optional) To remove an event:
 - a. Click  **EVENTS: 3**.
 - b. Select the Event you want to delete and click **Remove**.

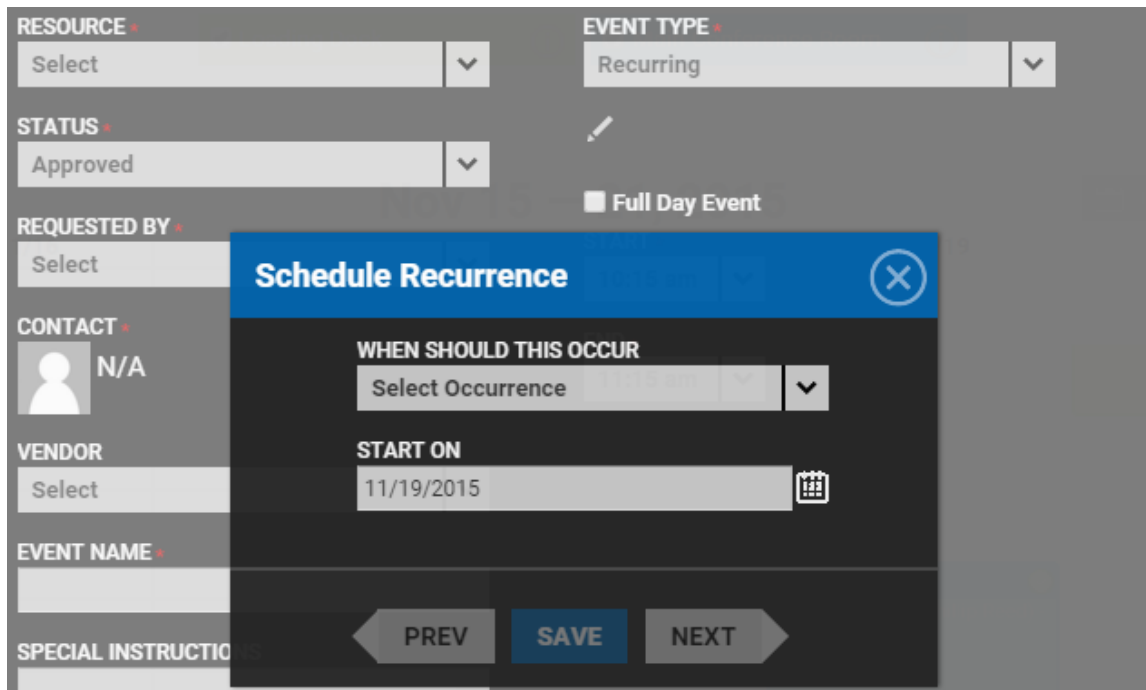
Creating a Recurring Reservation

You can book a resource for yourself or on behalf of a tenant. This section describes the process of creating a recurring reservation.

To book a recurring reservation for yourself or on behalf of a tenant:

1. Click **Go To** → **Resource Schedule** → **Resource Schedule Calendar**.

2. Select a building.
3. Click either  **CREATE RESERVATION** or click on the calendar to open up the resource reservation form.
4. Select a **RESOURCE**, **STATUS**, **REQUESTER**, **EVENT NAME**, and **EVENT TYPE** as **Recurring**.
5. Using the **SCHEDULE RECURRENCE** box, select a frequency, **Start On** date, and click **NEXT**.



6. Continue selecting the recurring reservation request options, followed by clicking **NEXT**.
7. Select an end date, and click **SAVE**.
8. Click **SAVE** to finalize the recurring reservation event.
9. (Optional) To edit a recurring reservation event:
 - a. Click the **Event** on the calendar.
 - b. Click to edit either the **SERIES** or an **OCCURANCE**.
 - c. Edit the series or occurrence and click **SAVE**.

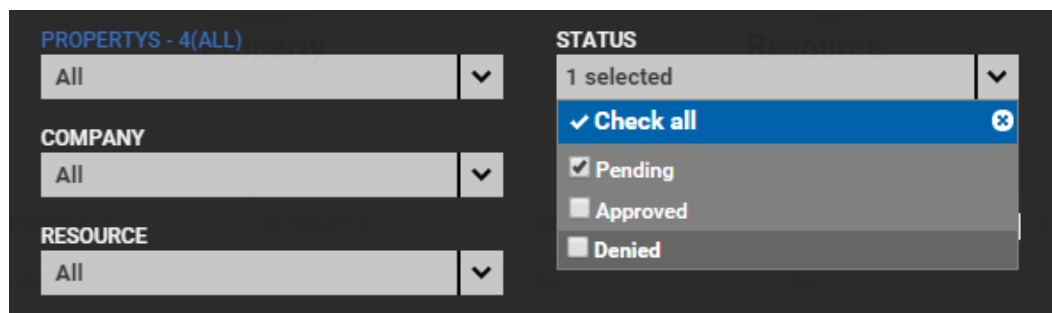
Managing Resource Reservations

After a resource request has been submitted it is moved into the Pending Requests section of Resource Scheduling. This section describes how to locate the Pending

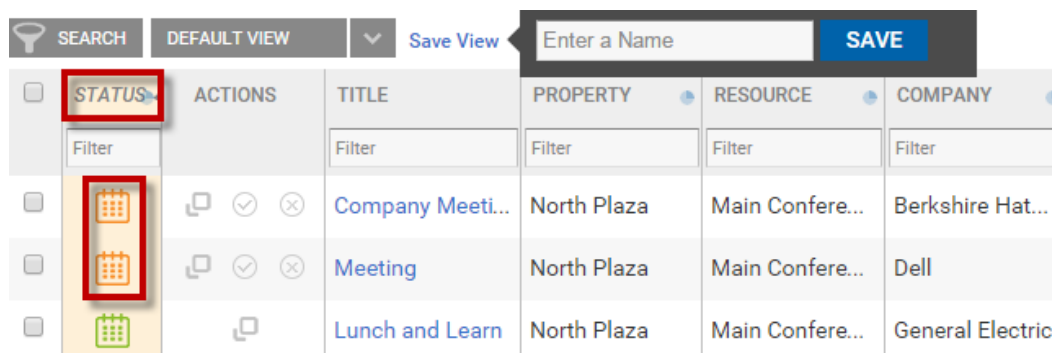
Requests, and then approve or deny them. *Note: Only System Admin users are able to approve or deny reservation requests.*

To locate a pending resource request:

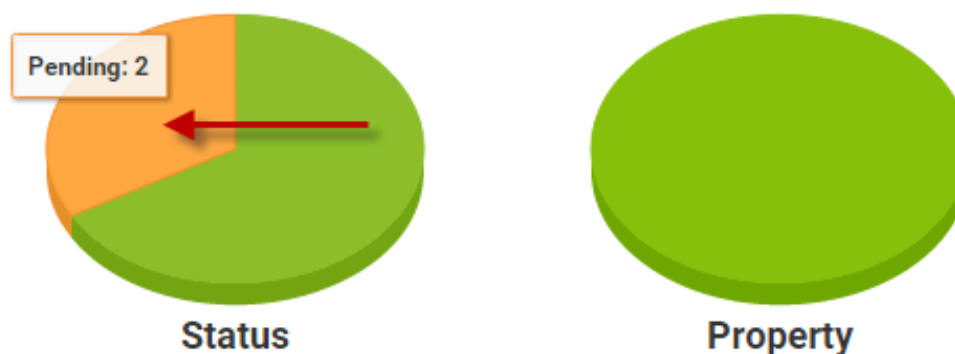
1. Click **Go To** → **Resource Schedule** → **Resource Schedule List**.
2. Pending requests are represented with a yellow icon. You can sort pending requests by:
 - a. Click **SEARCH** and sort the grid via the Pending **STATUS**.




- b. Click **STATUS** to filter all Pending requests to the top of the list.













- c. Click the yellow slice of the **Status** pie chart.



3. (Optional) Use the **SEARCH** and column filters to locate and review requests.

- (Optional) Click the Reservation **TITLE** to review the resource request.
- (Optional) Click  in the **ACTIONS** column to view the Reservation request on the calendar.

SEARCH		DEFAULT VIEW		Save View		
	STATUS	ACTIONS	TITLE	PROPERTY	RESOURCE	COMPANY
	Filter		Filter	Filter	Filter	Filter
<input type="checkbox"/>		  	Company Meeti...	North Plaza	Main Conf...	Berkshire Hat...
<input type="checkbox"/>		  	Meeting	North Plaza	Main Conf...	Dell

- Either click  to approve the request, or  to deny it.

Ending an In Progress Event

If you need to prematurely end an in-progress event in Resource Scheduling, Property Management employees can enter the reservation and end it. This section describes how to end an event early.

To end an event early:

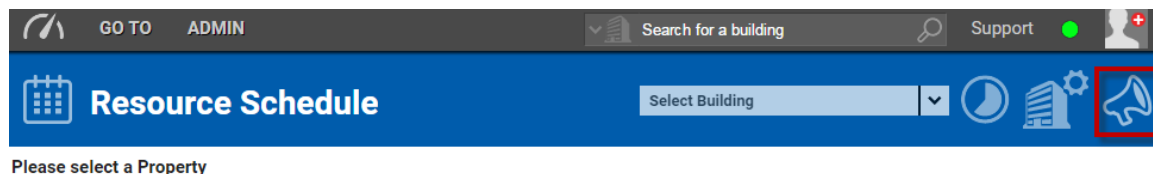
- Click **Go To → Resource Schedule → Resource Schedule Calendar**.
- Navigate and click on the event you want to end early.
- Click **END NOW**, and confirm by clicking **Continue**.

Managing Resource Notifications

This section describes the process of setting up and deleting notifications for Resource Scheduling, along with recommended notification setups.

To create a new notification:

- Click **Go To → Resource Schedule → Resource Schedule Calendar**.
- Click the bullhorn icon.




- Using the **Create New** section, select a **Building**, **Person** to be notified, **Type**, and **Method/Action**, and click **Add Notification**. Notifications are

then populated in the **Notifications** section. *Note: Selecting **Tenant as the person for a notification sends messages to the tenant contact associated with a specific reservation.*

To delete a notification:

1. Check the box next to the notification you want to delete.
2. Click **Delete**.

SelectPerson	Type	Method/Action	How
<input checked="" type="checkbox"/> Tenant	On Approval	EMail	
<input type="checkbox"/> Carl Dahl	On Pending Resource R...	EMail	na@na.com
<input type="checkbox"/> Carl Dahl	On Update	EMail	na@na.com

 Delete

Note: You have the option of setting up notifications to your preference, however, Building Engines has a recommended minimum notification setup.

The two notifications we recommend creating are:

- Notify **Tenant **ON APPROVAL** and **ON UPDATE**. This ensures that tenants are notified whether their reservation is approved, edited or denied.
- Notify a Property Management contact **ON PENDING RESOURCE REQUEST**. This ensures that the coordinator is always aware when a new reservation request is submitted. These notifications will contain a link to the reservation, as well as a quick approval link.

Resource Task Management and Billing

All tasks and billing for resource reservations can be managed through work orders. This section describes how to configure the application to automatically create a work order prior to an event.

To configure the system to automatically create a work order prior to an event:

1. Click **Admin → Property Settings → Space Management**.
2. Select the building the Resource is in.
3. Click **Show Building Setup**.

4. Locate and expand the floor that the Resource is on.
5. Click the **(Configure)** located next to the Resource you want the system to create an automatic work order for.

Manage Space For: North Plaza

Floor	Room	Area	Resource	Occupancy	Action
5				100%	
4				100%	
3				100%	Edit
2				100%	
1				100%	
	100	0 sq/ft	General Electric		
	101	0 sq/ft	Toyota Motor		
	Main Conference Room	0 sq/ft	Meeting Area		(Configure)
	Loading Dock	0 sq/ft	Freight Area		(Configure)

Hide Building Setup

Occupancy Rates

Total Occupancy: 100%
Total Suite(s): 11

Legend: Occupied (Blue), Vacant (Orange)

6. Within the **Configure Resource** window, click **Create Work Order to manage related tasks and billing**.
7. Select how many days in advance you want the work order created prior to the event. *Note: If a reservation is approved within the designated time frame, the work order will be created immediately.*

Options

☐ Prevent Tenants from Reserving this resource

☐ Auto Approve Reservations

☒ **Create Work Order to manage related tasks and billing**

Create days before reservation

Allow Tenants in these other buildings to access this resource:
Select A Building

Require day(s) in advance notice to schedule

day(s) in advance notice to cancel

min(s) setup time before

min(s) cleanup time after

8. Click **SAVE** to finish.

Setting up a Resource Request Work Order Notification

If you decide to configure the system to automatically create a work order prior to an event, it is highly recommended that you configure an accompanying work order notification. This notification can be used to remind the assignee about the tasks and/or billing associated to the event.

To configure a notification for a resource request work order:

1. Click **Admin → Notifications**.
2. Click .

- Using the **Issue Type** field, select either **Freight Area Request** or **Meeting Area Request**. The type selected is determined based on the room type selected while creating the resource space.

New Notification

BUILDING *
North Plaza

ISSUE TYPE *
Select

- Keys
- Light Bulbs
- Miscellaneous
- Plumbing
- Trash Removal/Recycling
- Leak
- Access Card Request
- Access Card Cancellation
- Freight Area Request**
- Meeting Area Request**

RECIPIENT *
Select


ACTION *
Select


- Select and **On Status, Recipient, Action**, and click **SAVE**.


Tracking a Resource Request Billable

Work orders that are created for a Resource are created with a tenant's special instructions and Event charges already included. These charges are preset on the Configure Resource page, however, may be added, edited, or deleted on the work order as needed.

Resource Request Work Orders appear in the regular Work Order section of the application. The following image is example of work order created from a resource request.


Meeting Area Request - #351271974


1
21
Berkshire Crossing - BE Building Services



REQUESTED BY:
John Smith

ASSIGNED TO: Unassigned

ISSUE TYPE: Meeting Area Request

FLAG: -- No Flag --

STATUS: New

BUILDING: Berkshire Crossing

TENANT: BE Building Services

FLOOR: 5

SUITE: Conference 5A


LOCATION: Conference 5A


CREATED: 05/19/2015 02:13 PM


Details: Event: Company Meeting Date/time: May 20, 2015 3:00 PM - 6:00 PM Special Instructions:

← REASSIGN
▲ CHANGE STATUS
📅 SCHEDULE
💬 ADD COMMENT
⏸ HOLD
↵ SHARE
🖨 PRINT

Billable items are displayed in the **Labor and Materials** Section of the Work Order. The following image is an example of a billable item from a resource request.


Labor and Materials \$300.00



	NAME	PRICE/RATE	QTY/HRS	SUBTOTAL	TAX	MARKUP	MARKUP TAX	TOTAL	BILLABLE
<input type="checkbox"/>	 5A Conference Room Rate	\$100.00	3	\$300.00	0.00%	0.00%	0.00%		✓

Pre-Recorded Resource Schedule Webinar Link

To access a pre-recorded demo of the Resource Scheduling module click:

<https://buildingengines.wistia.com/medias/7l3sd5le7i>

Operations Performance Management

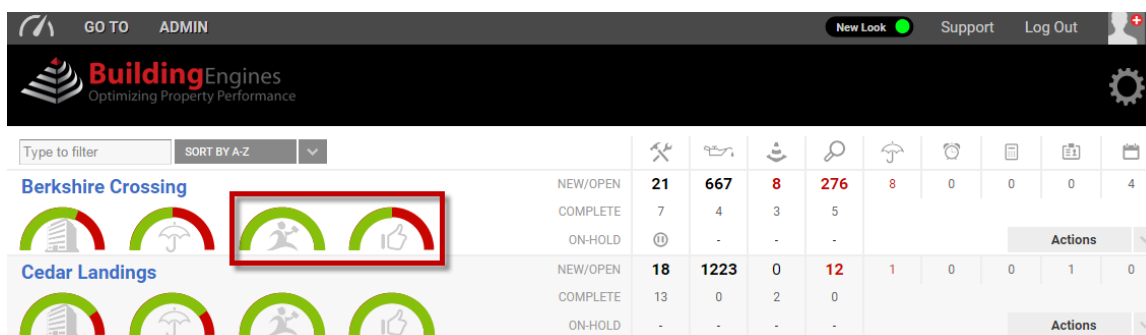
Operations Performance Management (OPM) allows you to define service performance targets, quickly act on any escalations, and proactively monitor tenant satisfaction. OPM ensures that service delivery expectations are consistently met throughout the work order process.

Viewing Dashboard Metrics

Total Service Delivery (TSD) and Tenant Satisfaction (TS) trends are monitored from the graphical gauges available on the home dashboard. The TSD graphic summarizes all of the work order activity for a specific time period based on your established service targets, while the TS graphic summarizes tenant satisfaction levels.

To turn enable the TSD and TS graphics on your homepage:

1. Click the gear icon on the home screen dashboard.
2. In **Settings**, click **Display Total Service Delivery** and **Display Tenant Satisfaction**.
3. (Optional) Clicking either the TSD or TS graphic routes you to that building's TSD or TS data.



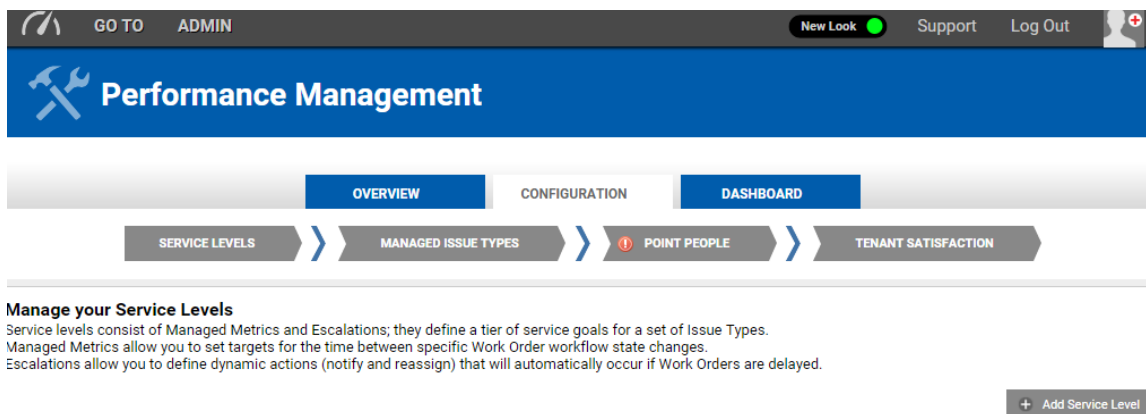
Configuring Service Levels, Delivery Targets, and Escalations

Service Levels defined through the Operations Performance Management module consist of **Metrics**. A metric is any change in workflow state for a work order. Each metric includes a defined **Target** time and **Escalation** if that target is not achieved. Escalations can include notifying a recipient and/or automatically reassigning the work order.

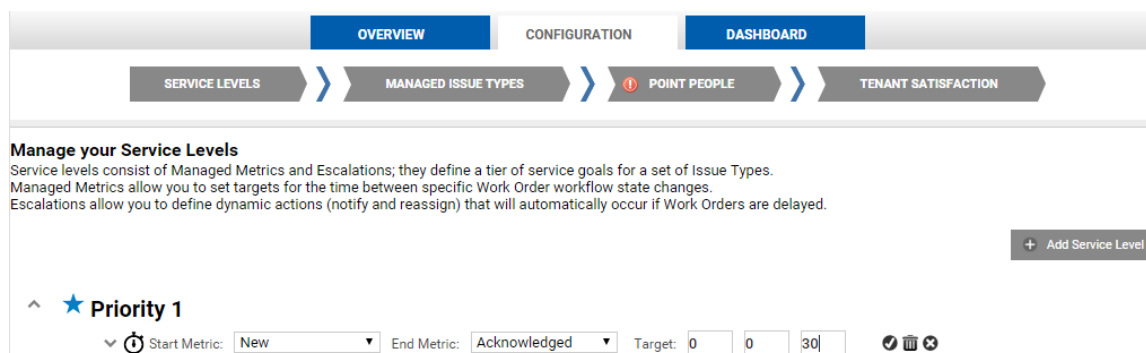
To configure your Service Level metrics:

1. Click **Admin** → **Performance Management** → **OPM Configuration**.
2. Click the **Configuration** tab. *Note: The **Overview** tab will display and describe the 4 phases of Performance Management. Samples are provided for Service Priorities, Targets, and Escalations.*

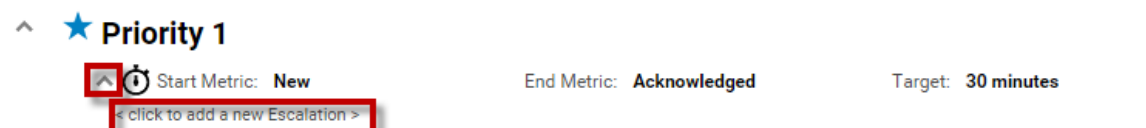
3. Provide a name for the initial **Service Level**, and click the adjoining check mark to save.



4. To add additional Service Levels, click **Add Service Level**, and repeat the previous step.
 5. Once all Service Levels have been created, each service level can be configured with specific Metrics (time targets) for each work order status. Expand the relevant Service Level by clicking the triangle next to the blue star, and clicking the link **< click to add a new Metric >**.
 6. Provide a **Start Metric**, **End Metric**, and **Target** in days, hours, or minutes. Continue adding Metrics for all Service Levels. To save, click the check mark.
- Example shown below – *New to Acknowledged* in 30 minutes.



7. Click the arrow next to the **Start Metric** and click **< click to add a new Escalation >**.



8. If a Service Level Metric is missed, an Escalation triggers a notification to the individual(s) specified on the Point People tab. When you finish creating your Escalation, click the check mark to save.
 - a. **Action** – trigger an escalation email or reassign the work order.
 - b. **Lag Time** – the amount of time between the start of the metric and when the Escalation is triggered.
 - c. **Recipients** – the Point Person notified, or reassigned, from the Point People tab.

Example shown below – If *New to Acknowledged* takes longer than 30 minutes and *email notification* is sent to the *Property Manager* Point Person.

^ ★ **Priority 1**

Start Metric: **New** End Metric: **Acknowledged** Target: **30 minutes**

Action:	Email	Lag Time:	Days	Hours	30	Recipients:	Property Manager
---------	-------	-----------	------	-------	----	-------------	------------------

✓ ✕

9. Once all Metrics and Escalations have been configured, click **MANAGED ISSUE TYPES** at the bottom of the page.

Configuring Managed Issues Types

The Managed Issue Types tab allows you to select the appropriate Service Level for each of your issue types. These issue types may be managed portfolio-wide, regionally, for individual buildings, or for specific tenants.

To classify each issue type into the appropriate Service Level:

1. Select the **[+]** to expand the portfolio, region, building, or tenant located on the left side tree. *Note: To better understand the tree setup, click [Tree Legend].*

2. **Click, drag, and drop** the issue types in the **Unmanaged** box into the appropriate Service Level.

The screenshot shows the 'Performance Management' dashboard with tabs for OVERVIEW, CONFIGURATION, and DASHBOARD. The CONFIGURATION tab is active, showing a breadcrumb trail: SERVICE LEVELS > MANAGED ISSUE TYPES > POINT PEOPLE > TENANT SATISFACTION. The 'POINT PEOPLE' tab is selected, displaying the 'Configure Issue Types/Service Levels' screen. This screen shows a tree view on the left with items like '(BEI DEMO - CARL)', 'Berkshire Crossing', and 'Cedar Landings'. The main area has three columns: 'Unmanaged', 'Priority 1', and 'Priority 2'. Red arrows indicate moving 'Access Card Canc...' from 'Unmanaged' to 'Priority 1' and 'Access Card Requ...' from 'Unmanaged' to 'Priority 2'. The 'Unmanaged' column lists: Rent Collection, Spot Inspection, Access Card Canc..., Access Card Requ..., Cleaning, Freight Area Request, and Keys. The 'Priority 1' column lists: Badges, Electrical, Plumbing, Sprinklers, and Too Hot/ Too Cold. The 'Priority 2' column lists: After Hours Air, Eviction Notice, Exterior Lights, Interior Lights, and Light Bulbs. There are 'SAVE' and 'CANCEL' buttons at the bottom right.

3. Once you finish moving the issue types into the appropriate Service Level, click **SAVE**.

Configuring Point People

Point People are the property management team's key personnel. These individuals will be notified, or have work orders reassigned to them, when a work order requires additional attention or intervention. The roles consist of the **Engineering Group, General Manager, Property Manager**, and **Quarterback** roles and can be configured for each building.

To designate a Point Person:

1. Click the **Point People** tab.

2. Select the Point Person for each role designated on the Service Levels.

BUILDING	ENGINEERING GROUP	GENERAL MANAGER	PROPERTY MANAGER	QUARTERBACK
Berkshire Crossing	Edit Group - 0	Jon Dahl	Unspecified...	Unspecified...
Cedar Landings	Edit Group - 0	Carl Dahl	Unspecified...	Unspecified...

SETUP TENANT SATISFACTION

3. Click **Setup Tenant Satisfaction** once you are finished.

Activating Tenant Satisfaction

The Tenant Satisfaction portion of OPM allows you to capture tenant's satisfaction ratings. As with Managed Issue Types, Tenant Satisfaction can be managed portfolio-wide, regionally, for individual buildings, or for specific tenants. Satisfaction Ratings are captured through a one-click survey using the **Thumbs Up**, **Neutral**, or **Thumbs Down** paradigm.

Tenants can provide satisfaction ratings through an automatic email response, or by clicking the appropriate rating icon when logged into the Tenant Portal and viewing the relevant work order.

To enable Tenant Satisfaction:

1. Click the **Tenant Satisfaction** tab.
2. Click **Allow Tenants to enter Satisfaction Ratings**.
3. If a tenant does not rate their experience from the Tenant Portal, an email can be automatically sent allowing them to rate their experience with one click. To enable this function, click **Send Tenant an email work order is done**.

- (Optional) In some cases you may have a tenant employee who creates work orders often and does not want a survey with each work order. To adjust the frequency of satisfaction emails, enter a figure in the **every [] Work Order(s)** box. If a Tenant fails to respond to the initial satisfaction email, confirmation emails can also be configured using the **Resend Confirmation** boxes.

Tenant Satisfaction
This wizard provides simple bulk management of Tenant Satisfaction settings.

Select an item from the tree [\[Tree Legend \]](#)

- ✓ (BEI DEMO - CARL)
 - ✓ Berkshire Crossing
 - ✓ Cedar Landings

Configure Tenant Satisfaction
These settings will affect: (BEI DEMO - CARL)

☐ Allow Tenants to see SLA Targets

☒ Allow Tenants to enter Satisfaction Ratings

☒ Send Tenant an email when work order is done, every: Work Order(s)

Resend Confirmations: time(s), every: Day(s)

When a Tenant indicates dissatisfaction with a Work Order, reopen the Work Order, raise to alert, and:

Notify: ☐ Assignee ☐ Engineering Group
☒ General Manager ☒ Property Manager
☐ Quarterback

Reassign To:

SAVE **CANCEL**

- Select the Point People who are notified or reassigned to the work order if a tenant indicates dissatisfaction.
- Click **Save** to activate Tenant Satisfaction.
- Click **Save Configuration** to save all updated settings for the configuration of Operations Performance Management and Tenant Satisfaction.

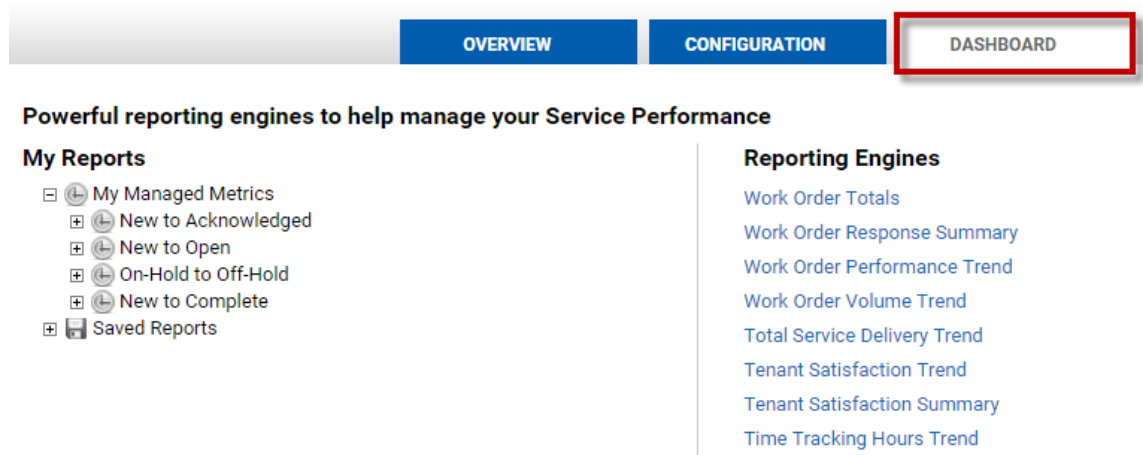
Viewing Performance Management Reports

Operations Performance Management features powerful reporting tools that provide insight into service delivery performance. This section describes how to access the TSD and TS reporting.

To view TSD and TS reporting:

- Click **Admin → Performance Management → OPM Dashboard**.

2. Click the **Dashboard** tab.



3. Select a report from either **My Reports** or **Reporting Engines**.

- **My Reports:** This is a list of pre-defined reports that are based on any configured Managed Metrics, as well as any reports you have saved or scheduled.
- **Reporting Engines:** These reports are highly flexible, and feature interactive summaries and trend reporting tools. They can be customized for different chart types, timeframes, and filters for **Groups, Buildings, and Issue Types**.

Scheduling and Saving OPM Reports

This section describes how to save and schedule the delivery of your TSD and TS reports.

To save and schedule a report in the OPM module:

1. Click **Admin → Performance Management → OPM Dashboard**.
2. Click **Dashboard** tab.
3. Select a report from either **My Reports** or **Reporting Engines**.

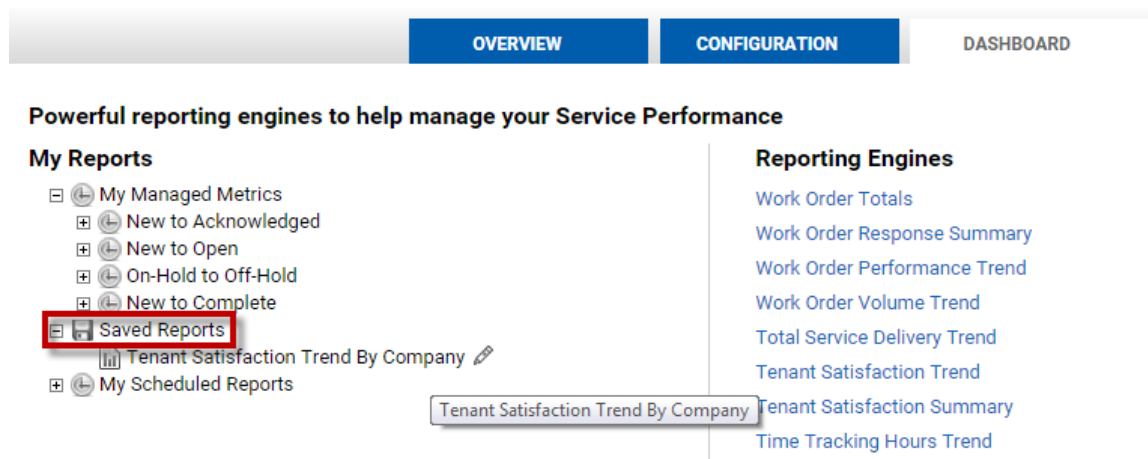
- Enter the parameters for the report and click **Show Results**. *Note: The blue filters can be utilized to further filter the report.*


- Click the floppy disk icon.
- Provide a name, and click **Schedule Delivery** to specify the frequency, delivery format, and date range.

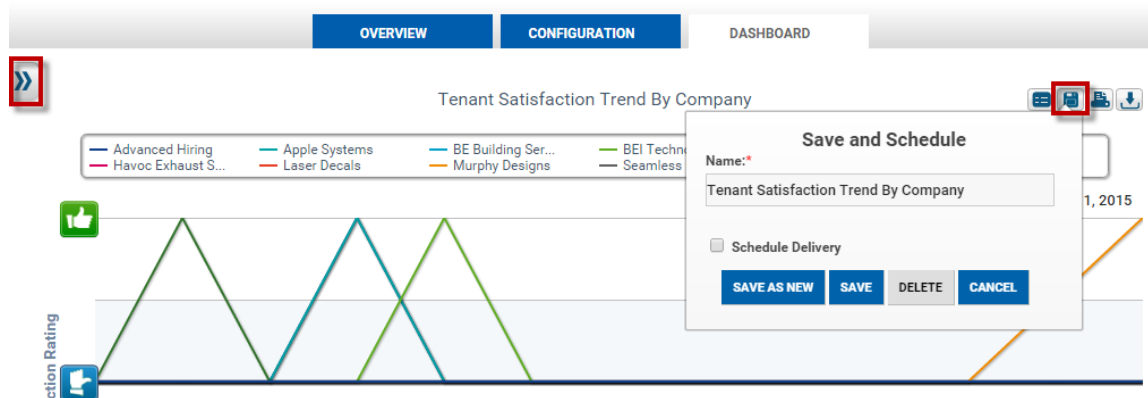
To edit or delete a previously scheduled report:

- Click the **Dashboard** tab.

2. Select the report you want to edit under **Saved Reports**.



3. Hover over the report and click the pencil icon located to the right of the report name.
4. Either use the  located on the left side of the page to edit the report, or click the floppy disk icon to edit your delivery preference, save your edits, or delete the scheduled delivery.



Certificate of Insurance

Certificate of Insurance (COI) tracking is a vital risk-management activity. Without an efficient process and visibility into this critical area you may needlessly expose yourself and your insurer to potential liability.

The COI Module reduces liability exposure by ensuring that all vendors and tenants are properly insured and have current certificates of insurance on file. Using Building Engines to manage your COIs eliminates paper-based processes through an easy-to-use system and automated management process.

Notifications and Messaging

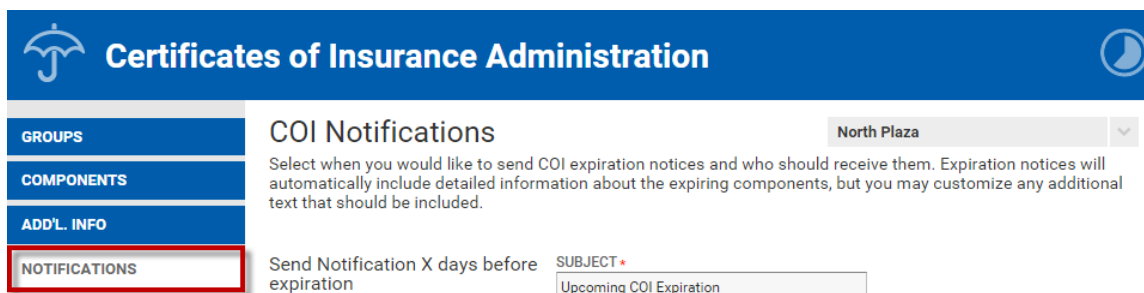
The notifications and messaging functionalities allow you to configure automatic, interval-specific, notifications at the building level. While automatic notifications are not required, it is highly recommended that you establish a notification protocol before entering your tenant and vendor COIs. This section describes the process of setting up automatic notifications and sending expiration notices.

Setting up Automatic Notifications

Automatic notifications can be configured to notify the tenant, vendor, and/or group of internal contacts at 10, 30, or 60 days prior to the expiration of a COI. This section describes the process of setting up an automatic expiration notification.

To configure an automatic expiration notification:

1. Click **Go To > Certificate of Insurance > COI Admin.**
2. Click the **Notifications** tab.



The screenshot displays the 'Certificates of Insurance Administration' interface. On the left, a sidebar contains four tabs: 'GROUPS', 'COMPONENTS', 'ADD'L. INFO', and 'NOTIFICATIONS'. The 'NOTIFICATIONS' tab is highlighted with a red border. The main content area is titled 'COI Notifications' and includes a dropdown menu set to 'North Plaza'. Below the title, there is a descriptive text: 'Select when you would like to send COI expiration notices and who should receive them. Expiration notices will automatically include detailed information about the expiring components, but you may customize any additional text that should be included.' Further down, there is a label 'Send Notification X days before expiration' and a 'SUBJECT*' field with the text 'Upcoming COI Expiration'.

3. Select a property and the days prior to COI expiration that you want the system to notify the recipient.

Certificates of Insurance Administration

COI Notifications

Select when you would like to send COI expiration notices and who should receive them. Expiration notices will automatically include detailed information about the expiring components, but you may customize any additional text that should be included.

PROPERTY: North Plaza

Send Notification X days before expiration

☒ 10 Days
☐ 30 Days
☐ 60 Days

SUBJECT *
 Upcoming COI Expiration

Message
 The following coverages will expire on the indicated dates:

4. Select the employee **GROUP** you want to notify.

*Note: To manage group members, click **Edit Group**.*

Send Notification X days before expiration

☒ 10 Days

NOTIFY GROUP
 COI Administrators

Edit Group
☐ and Vendor
☐ and Tenant

SUBJECT *
 Upcoming COI Expiration

Message
 The following coverages will expire on the indicated dates:

Name	End Date	Amount
Example Name	01/01/2020	\$1,000,000
Expiring Name	01/01/2010	\$9,000,000

5. (Optional) If you want the notification to go to the tenant and/or vendor, select that option for each notification increment.
6. (Optional) Edit the **SUBJECT** and **ADDITIONAL MESSAGE** fields if you prefer to send a customized message.
7. Click **SAVE** to finish the notification configuration.

Sending an Expiration Notice



The COI Module allows you to manually send COI expiration notifications directly from the COI record. This section describes the process of sending an expiration notice to a tenant or vendor from the expired COI.

To send an expiration notice:

1. Click **Go To > Certificate of Insurance > COI Dashboard**.
2. Use the **SEARCH** button and/or filters to locate the COI.

- Click the COI **NAME** to access the expired COI.

*Note: Expired COIs are denoted in the **STATUS** column with a **red** colored umbrella icon.*

SEARCH		DEFAULT VIEW		Save View		ACTIONS		SHARE		EXPORT			
<input type="checkbox"/>	NAME	STATUS	TYPE	PROPERTY	TENANT	VENDOR	DATE CRE...	CREATED ...	LAST UPD...	EFFECTIVE...	EXPIRES	FACILITY ...	VENDOR
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input type="checkbox"/>	FedEx COI		Tenant	North Pl...	FedEx		04/03/2...	Carl Dahl	04/03/2...	04/01/2...	04/01/2...	n/a	
<input type="checkbox"/>	JJ COI		Tenant	North Pl...	Johnson ...		02/25/2...	Carl Dahl	02/25/2...	02/25/2...	02/25/2...	n/a	

- Hover over **SHARE** and click **Send Expiration Notice**. A new browser opens up with the messaging functionality.

North Plaza	TYPE: COMPANY:	Tenant FedEx	RENEWAL HISTORY:	N/A
-------------	-------------------	-----------------	------------------	-----

EDIT COMPLIANCE
ADD COMMENT
RENEW
CLOSE
CANCEL
DELETE
SHARE

Send Message
Send Expiration ...

- (Optional) The **MESSAGE**, **SUBJECT** and **SENDER ALIAS** fields can be edited to your preference.

- Select your message recipients, and click **SEND**.

Note: Expiration notices contain a hyperlink that allows the recipient to upload a renewed copy of their COI into the system. When the attachment is uploaded, the application begins the framework for a renewed COI.

Compliance

Incorporating a compliance group into your COI workflow allows you to define the compliance standard for your portfolio. Once this standard has been implemented, you can quickly identify the necessary coverage amounts and components for a compliant COI.

If your portfolio of properties extends across multiple regions a single compliance group may not be adequate. To facilitate a different set of requirements you can create multiple compliance groups, each with their own set of coverage amounts and components, and then assign each building to the appropriate compliance group.

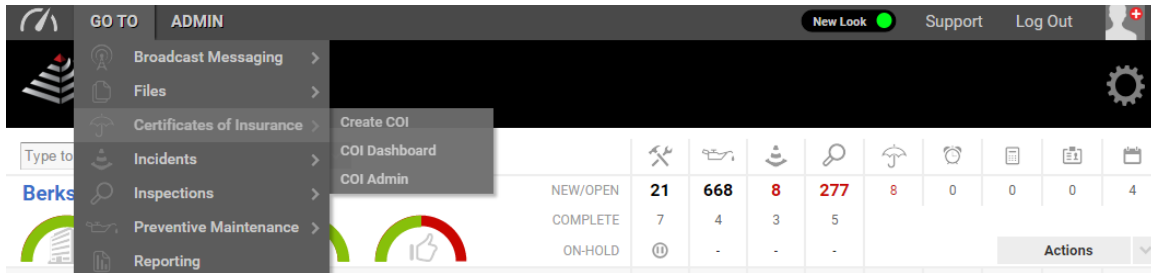
This section describes how to create COI compliance groups, define compliance requirements, and manage compliance exceptions.

Creating a Compliance Group

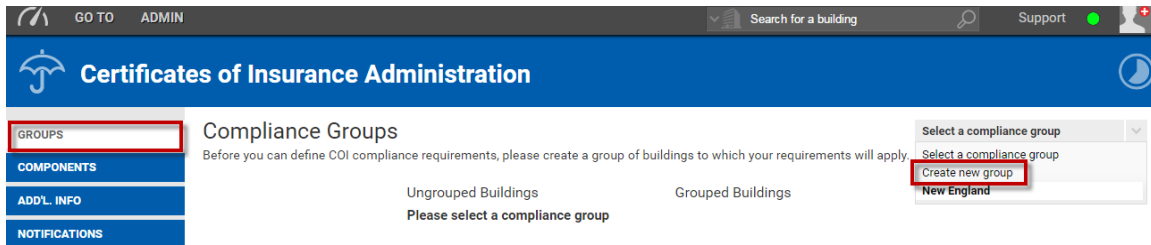
Buildings can be grouped by state, region, or compliance requirement. New COIs created in a building associated to a compliance group follow the setup that is configured for that group. This section describes the process for creating a compliance group.

To create a compliance group:

1. Click **Go To > Certificate of Insurance > COI Admin.**



2. Click the **GROUPS** tab.
3. Navigate to the **Select a compliance group field** and select **Create New Group.**



4. Enter a **GROUP NAME.**
5. Click and highlight the buildings that you want to add to the compliance group and click the **>** icon.

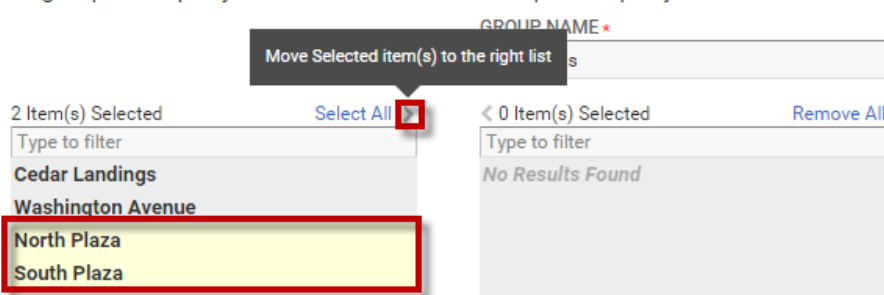
Compliance Groups

The Plazas

Before you can define COI compliance requirements, please create a group of buildings to which your requirements will apply.

Ungrouped Property

Grouped Property



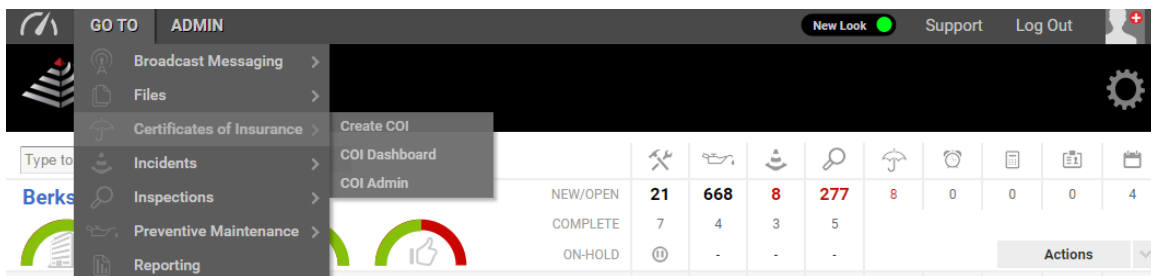
- Click **SAVE**.

Standardizing Compliance Group Components

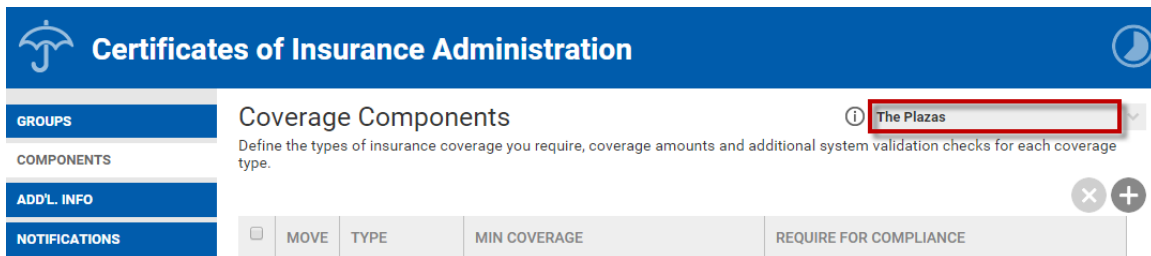
After a compliance group is created you must define the minimum coverage amount for each component. Optionally, you can define minimum coverage amounts for your tenants which differ from your vendors. Although COIs that do not meet the minimum coverage amount can be entered, they are marked in the system as non-compliant. This section describes the process of standardizing a compliance group.


To standardize a compliance group:

- Click **Go To > Certificate of Insurance > COI Admin**.



- Click the **COMPONENTS** tab.
- Select a **Compliance Group**.



- Configure the template to represent the order and type of component, minimum coverage amount, and if there must be additional information added. Coverage components can be moved up and down by clicking on the component and doing a drag and drop. To add additional components, click .
 - TYPE:** Enter the coverage component name.
 - MIN COVERAGE:** Enter the minimum coverage amount for both tenant and vendor COIs.

- **REQUIRE FOR COMPLIANCE:** Select the box which corresponds to the data you want added to each COI.

*Note: The **Insurer** option is integrated with the A.M. Best Ratings. Insurers who do not meet the current A.M. Best Rating are flagged as non-compliant.*

Coverage Components

Define the types of insurance coverage you require, coverage amounts and additional system validation checks for each coverage type.

MOVE	TYPE	MIN COVERAGE	REQUIRE FOR COMPLIANCE
<input type="checkbox"/>	General Liability	VENDOR 2000000 TENANT 1000000	<input type="checkbox"/> Additional Insured <input type="checkbox"/> Policy Number <input checked="" type="checkbox"/> Insurer Min Rating: none Min FSC Rating: none
<input type="checkbox"/>	Automobile Liab	VENDOR 2000000 TENANT 1000000	<input type="checkbox"/> Additional Insured <input type="checkbox"/> Policy Number <input type="checkbox"/> Insurer

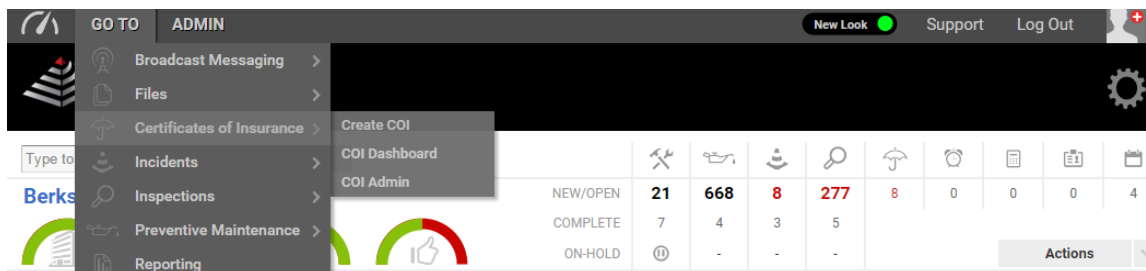
5. (Optional) Click to add or to delete components.
6. Click **SAVE**.

Adding Additional Compliance Questions

The Additional Info tab allows you to create an additional layer of compliance verification through the use of a compliance check and/or custom question(s). This section describes the process of implementing a compliance check and an optional custom compliance question.

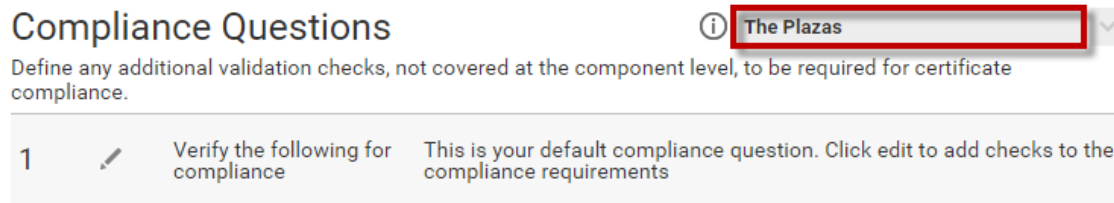
To create a compliance check and question:

1. Click **Go To > Certificate of Insurance > COI Admin**.



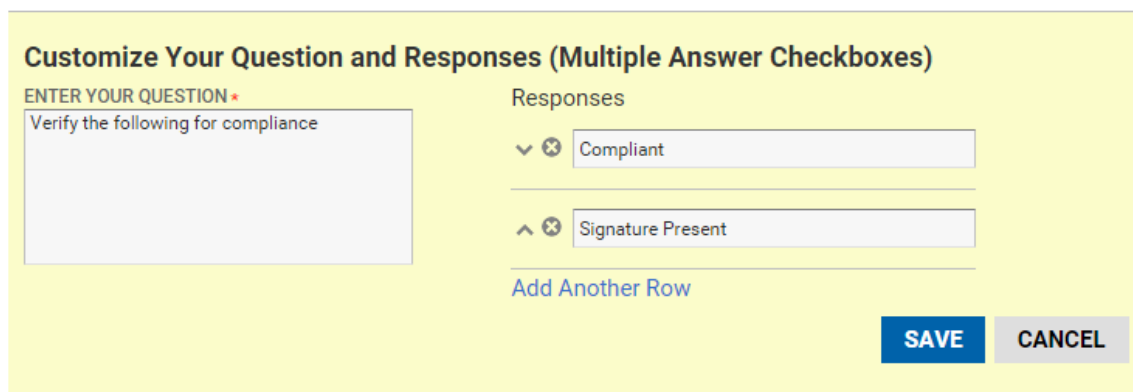
2. Click the **ADD'L. INFO** tab.

3. Select a **Compliance Group**.



4. Click the pencil icon .

5. Enter your compliance question and the corresponding responses. The following is an example.



6. Click **SAVE**.

7. (Optional) To create a custom compliance question, enter your question in the **Customize Your Question and Responses** field.

8. Specify the **MAXIMUM CHARACTERS**.

9. (Optional) If required for compliance, click **Require for Compliance**.

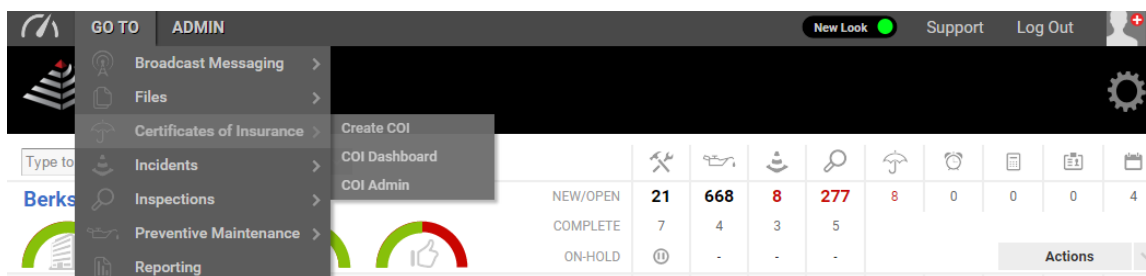
10. Click **SAVE**.

Manually Overriding Compliance for a COI

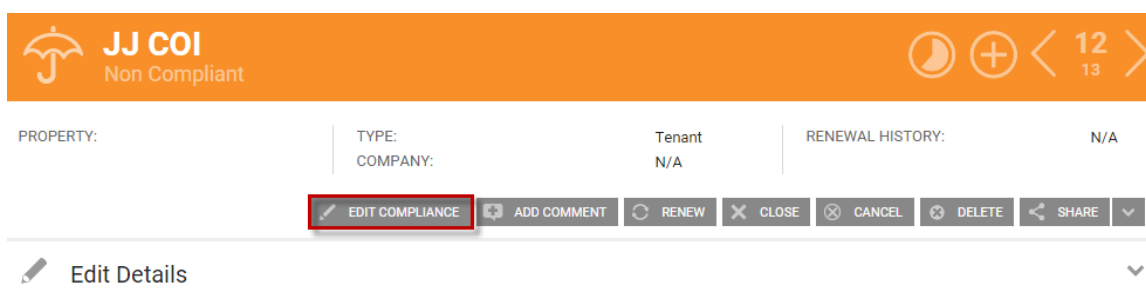
In some instances it may be necessary for you to override the compliance standard and mark a non-compliant COI as compliant. This section describes the process of marking a non-compliant COI as compliant.

To mark a non-compliant COI as compliant:

1. Click **Go To > Certificate of Insurance > COI Dashboard**.



2. Use the **SEARCH** button and/or filters to locate the COI.
3. Using the **NAME** column, click the hyperlinked COI name.
4. Click **EDIT COMPLIANCE**.



5. Click **Mark as Compliant**, provide an optional remark, and click **SAVE**.

Defining Coverage Standards at the Tenant Level


Compliance standards can be defined at the group and/or tenant level. If there is a compliance standard defined at the group level, creating an additional tenant level standard allows you to manage each tenant individually. Note that a group level compliance standard is not required when defining compliance standards at the tenant level. This section describes the process of defining coverage standards at the tenant level.

To define a tenant level coverage standard:

1. Click **Admin > Tenants > Companies**.
2. Use the **SEARCH** button and/or filters to locate the tenant company.
3. Using the **NAME** column, click the tenant company.



4. Hover over the **COI** tab and click **Configure COI Coverages**.

The screenshot shows the BE Building Services interface. On the left, there is a sidebar with a 'COMPANY' section containing links for EMPLOYEES, SUITES, LEASES, AFFILIATES, WORK ORDERS, COI, and FILES. The 'COI' link is highlighted, and a dropdown menu is open, showing options: 'View COIs', 'Create COI', and 'Configure COI Coverages' (which is highlighted with a red box). The main content area is titled 'Company' and includes fields for 'COMPANY NAME' (filled with 'BE Building Services'), 'BUILDING' (filled with 'Berkshire Crossing'), and 'FLOOR' (filled with '4'). To the right of these fields is a section titled 'Invoice Contact and Address' with input fields for 'FIRST NAME', 'LAST NAME', 'EMAIL', and 'PHONE'. A 'NOTES' section is visible at the bottom of the main content area.

5. Configure the template to represent the order and type of component, minimum coverage amount, and if there needs to be additional information added. Coverage components can be moved up and down by clicking on the component and doing a drag and drop. To add additional components, click .

- **TYPE:** Enter the coverage component name.
- **MIN COVERAGE:** Enter the minimum coverage amount for both tenant and vendor COIs.
- **REQUIRE FOR COMPLIANCE:** Select the box which corresponds to the data you want added to each COI.

*Note: The **Insurer** option is integrated with the A.M. Best Ratings. Insurers who do not meet the current A.M. Best Rating are flagged as non-compliant.*

6. (Optional) Click  to add or  to delete components.
7. (Optional) To add additional compliance questions, click **ADD'L INFO**. For more information on adding compliance questions, refer to the **Adding Additional Compliance Questions** section.
8. Click **SAVE**.

Managing Certificates of Insurance

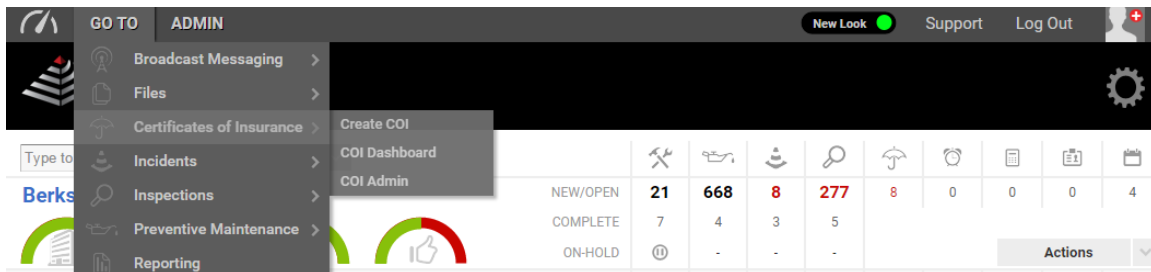
This section describes the functionality commonly associated with the day-to-day management of your certificates of insurance (COIs).

Creating a COI

Creating a COI record in the system allows you to manage a COI's compliance and effective dates. This section describes the process of creating a new COI.

To create a new COI:

1. Click **Go To > Certificate of Insurance > Create COI**.










2. Enter the COI **NAME**, **TYPE**, and **BUILDING**.

Note: Prior to entering COIs, Building Engines highly recommends that you select a naming convention. This minimizes confusion and adds conformity to your COI records.


After you select a **TYPE** and **BUILDING**, the **Coverage Components** grid appears. The configuration is displayed in the group or tenant level configuration (if either was previously configured).

- Use the provided fields to enter the COI information from the Accord form to the COI record.

 **Coverage Components**  

<input type="checkbox"/>	TYPE / INSURER	EFFECTIVE DATE	AMOUNT	ADDITIONAL INFORMATION
<input type="checkbox"/>	General Liability INSURER: <input type="text" value="Begin Typing"/> A.M. BEST: N/A	EFFECTIVE DATE: * <input type="text" value="04/07/2015"/>  END DATE: * <input type="text" value="04/06/2016"/> 	Min: \$1,000,000.00 \$ <input type="text"/>	POLICY NUM: <input type="text"/> ADD'L. INS.: <input type="text"/> <input type="checkbox"/> Subrogation Waived
<input type="checkbox"/>	Automobile Liability INSURER: <input type="text" value="Begin Typing"/> A.M. BEST: N/A	EFFECTIVE DATE: * <input type="text" value="04/07/2015"/>  END DATE: * <input type="text" value="04/06/2016"/> 	Min: \$1,000,000.00 \$ <input type="text"/>	POLICY NUM: <input type="text"/> ADD'L. INS.: <input type="text"/> <input type="checkbox"/> Subrogation Waived

- (Optional) To upload a scanned copy of the COI form:
 - Click **UPLOAD FILES**.
 - Click **ADD FILES** and select the file from your computer, file directory, or thumb drive.

Note: You may add multiple files to a COI record.
- (Optional) If you must add additional component fields to the COI record, click the  located above the **ADDITIONAL INFORMATION** column.
- Click **SAVE** to finish or **SAVE AND SHARE** to save the COI record and email the file.

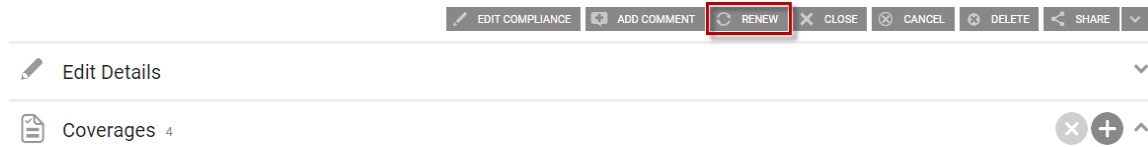
Renewing a COI

When a COI is renewed a new COI record is created and the expired COI record is closed out. This section describes the process of renewing a COI.

To renew a COI:

- Click **Go To > Certificate of Insurance > COI Dashboard**.
- Use the **SEARCH** button and/or filters to locate the expired COI.
- Using the **NAME** column, click the COI hyperlink.

4. Click **RENEW**.



5. Data from the expired COI record is prepopulated into the new COI fields. If any of the data is incorrect, edit as necessary.

6. (Optional) To upload a scanned copy of the COI form:

- a. Click **UPLOAD FILES**.
- b. Click **+ ADD FILES** and select the file from your computer, file directory, or thumb drive.

Note: You may add multiple files to a COI record.

7. (Optional) Click the **INTERNAL NOTES** field and enter your notes to add an internal-facing COI note,.

8. Click **SAVE** to finish or **SAVE AND SHARE** to save the COI record and email the file.

Renewing a Tenant or Vendor Uploaded COI

Expiration notifications sent to tenants and vendors contain a hyperlink that allows the recipient to upload a renewed COI into the system. When the COI file is uploaded, it triggers the application to begin the framework for a renewed COI.

The following steps describe the typical series of events that occur after a tenant or vendor is sent an expiration notice.

1. The tenant or vendor clicks **UPLOAD DOCUMENT** on the expiration notice.

{BEI DEMO - CARL}

COI

Expiration Notice

The following coverages will expire for BEI Technologies in Berkshire Crossing on the indicated dates:

Name	Expiration Date	Amount
General Liability	03/01/2017	\$100,000.00
Garage Liability	03/01/2017	\$1,000,000.00
Automobile Liability	03/01/2017	\$1,000,000.00

Have a new Certificate of Insurance? Use the link below to upload your renewal documents directly into Building Engines, or contact {BEI DEMO - CARL} to update the record of your coverage.

UPLOAD DOCUMENT

2. The tenant or vendor clicks **ADD FILES** and selects a COI file to upload.
3. The tenant or vendor clicks **UPLOAD** to finish their portion of the renewal process.

The following steps are performed from the property management portal:

4. After the COI has been uploaded, click **Go To > Certificate of Insurance > COI Dashboard**.
5. Click the paperclip icon located in the **EXPIRES** column. The paperclip icon lets you know that the tenant or vendor has successfully uploaded their COI.

<input type="checkbox"/>	Building Engines		Tenant	Berkshire Crossing	BE Building Servic...	02/12/2014	02/12/2014	12/01/2014	4
<input type="checkbox"/>	COI		Tenant	Berkshire Crossing	BEI Technologies	02/18/2017	02/01/2016	03/01/2017	3
<input type="checkbox"/>	Lexington		Management	Berkshire Crossing		07/08/2014	07/08/2014	07/08/2015	1

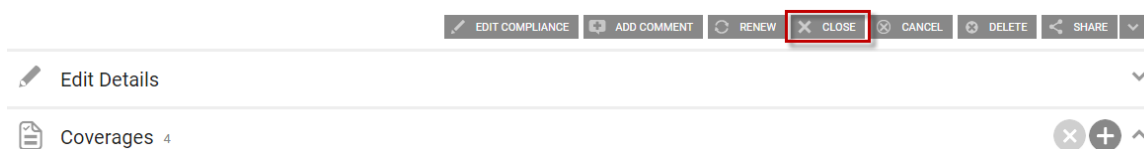
6. (Optional) Enter **Internal Notes**.
7. Update the coverage **AMOUNTS** and **EFFECTIVE DATES**.
8. Click **SAVE** to finish the process, or **SAVE AND SHARE** to save and share the COI with a colleague.

Closing a COI

While renewing a COI archives the expired record and creates a new record, closing a COI only archives the expired record. This section describes the process of closing a tenant or vendor COI record.

To close a COI:

1. Click **Go To > Certificate of Insurance > COI Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the COI.
3. Using the **NAME** column, click the COI hyperlink.
4. Click **CLOSE**.



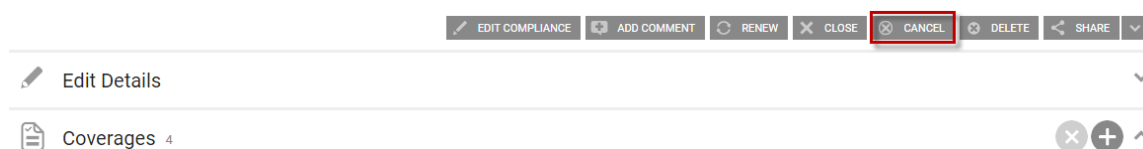
5. (Optional) Enter any relevant closing remarks.
6. Click **CLOSE**.

Cancelling a COI

If a tenant or vendor enters into a new contract with their insurance company, starting a new COI policy, you can cancel their current COI record. This section describes the process of cancelling an active COI.

To cancel an active COI:

1. Click **Go To > Certificate of Insurance > COI Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the COI.
3. Using the **NAME** column, click the COI hyperlink.
4. Click **CANCEL**.



5. Enter the **CANCELLATION DATE**, optional **CLOSING REMARKS**, and click **SAVE**

Associating a Tenant Company to a Vendor COI

In some regions, it is standard practice to manage vendor COI renewals through the tenant companies that utilize their services. If your management company prefers this workflow, a tenant company can be associated to a vendor COI. This section describes the process of associating a vendor COI to a tenant company.

To associate a vendor COI to a tenant company:

1. Click **Go To > Certificate of Insurance > COI Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the COI.
3. Using the **NAME** column, click the COI hyperlink.

4. Click **Edit Details**, and navigate to the **ASSOCIATED TENANT** field.

5. Select a tenant, and click **SAVE**.

COI Status, Dashboard and Health Monitor

This section provides clarification on COI status, helps you leverage the COI Dashboard, and explains how to minimize liability using the Health Monitor.

Understanding COI Status

The small icons displaying COI status can be found on numerous pages throughout the application. Below is an example from the **Tenant Companies** page.

Note: Tenant and vendor companies that are self-insured are displayed as compliant.

Tenant Companies									
Search Results Filtering									
SEARCH	DEFAULT VIEW	Save View		SHARE		EXPORT			
COMPANY	PROPERTY	COI	AREA	LEASE	CONTACT	PHONE	EMAIL	SUB LEASE	
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	
Aggie Com...	North Plaza		500,550		Tracey Beck	(555) 555-5555	na@na.com		
Berkshire...	North Plaza		401		Daniel Hamilton	(555) 555-5555	na@na.com		
Cell	North Plaza		400		Eileen Howard	(555) 555-5555	na@na.com		
FedEx	North Plaza		201		Delores Singleton	(555) 555-5555	na@na.com		
General El...	North Plaza		100		Evelyn Robinson	(555) 555-5555	na@na.com		
Johnson &...	North Plaza		300		Maria Vega	(555) 555-5555	na@na.com		

Since tenant and vendor companies may have more than one COI associated to a building, the worst status of all the COIs is what is displayed. The reason for

displaying the worst status is to alert you to potential liability within that tenant or vendor's group of COIs.

The worst status principle is also applied to the components section of the COI. For example, if a COI has multiple compliant and active components, but has one coverage component that is either expired or non-compliant, the COI is displayed as **non-compliant** or **expired**. Displaying the worst status is used to alert you to a potential liability within a COI.

The following image displays a set of COI coverage components. While most components are active and compliant, the COI is marked as non-compliant due to a single component being out of compliance.

Note: Coverage amounts that fail to meet the minimum threshold are displayed red.

The screenshot shows a 'Tenant COI Non Compliant' dashboard. At the top, there's an orange header with an umbrella icon and the text 'Tenant COI Non Compliant'. Below this, there's a navigation bar with tabs: BUILDING (Berkshire Crossing), TYPE COMPANY (Tenant InCom Corporation), and RENEWAL HISTORY (Created by renewal On 01/21/2016). A toolbar contains buttons: EDIT COMPLIANCE, ADD COMMENT, RENEW, CLOSE, CANCEL, DELETE, and SHARE. Below the toolbar, there's a section titled 'Edit Details' and a 'Coverages 4' section. The 'Coverages 4' section contains a table with the following data:

	TYPE	INSURER	EFFECTIVE DATE	END DATE	AMOUNT	POLICY NUM	ADD'L. INS.	SUBR. WAIVED
<input type="checkbox"/>	Automobile Liability		08/14/2015	08/14/2016	\$100,000 <small>Min \$1,000,000</small>			
<input type="checkbox"/>	Excess Liability		01/15/2016	01/15/2017	\$1,000,000 <small>Min \$1,000,000</small>			
<input type="checkbox"/>	Garage Liability		01/15/2016	01/15/2017	\$1,000,000 <small>Min \$1,000,000</small>			
<input type="checkbox"/>	General Liability		01/15/2016	01/15/2017	\$1,000,000			

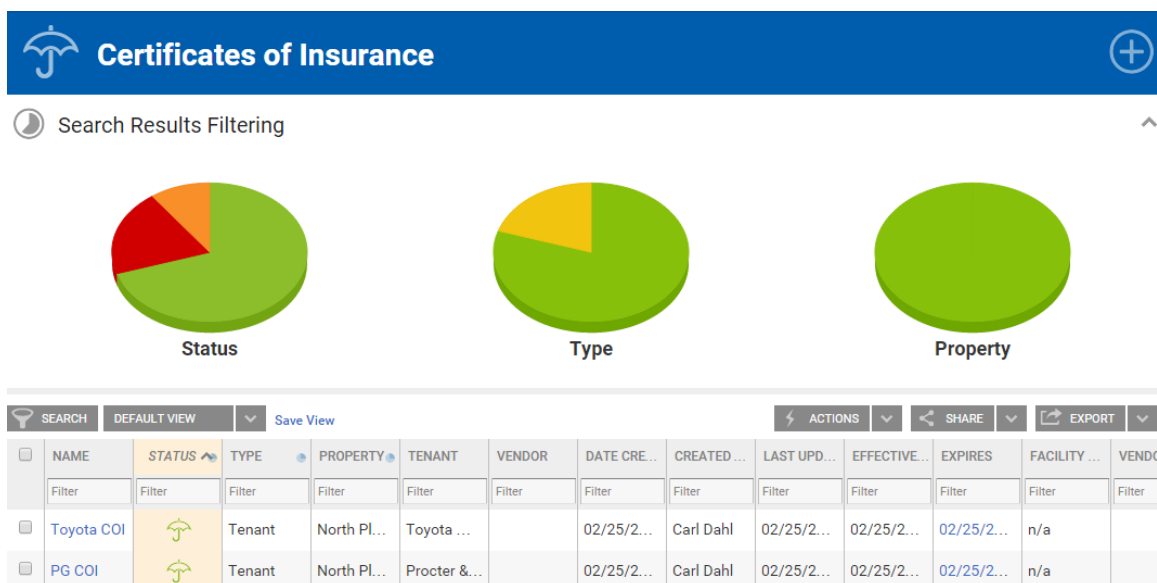
COI Dashboard

The COI Dashboard provides straightforward visibility into building level compliance. The following table defines the status of each color.

Color	Meaning
Green	Represents tenants or vendors With coverage
Red	Represents tenants or vendors Without coverage
Yellow	Represents tenant or vendors that are Non-Compliant
Grey	Represents tenant or vendors Missing Coverage

To locate the COI Dashboard:

1. Click **Go To > Certificate of Insurance > COI Dashboard**.
2. Select a **BUILDING** and click **SEARCH**.

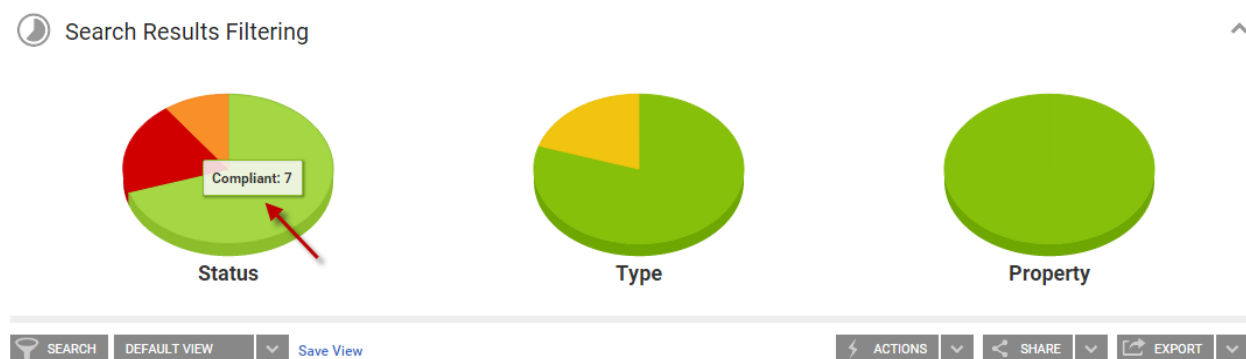


To toggle the graphs on and off: Navigate to the column name of the graph you want to turn on or off, and click the graph icon shown below.

<input type="checkbox"/>	NAME	STATUS	TYPE	PROPERTY	TENANT	VENDOR	DATE CRE...	CREATED ...	LAST UPD...	EFFECTIVE...	EXPIRES	FACILITY ...	VENDC
--------------------------	------	--------	------	----------	--------	--------	-------------	-------------	-------------	--------------	---------	--------------	-------

Alternatively, you can collapse all of the graphs by clicking the ^ arrow located in the top right corner of the graphs section.

To display graph data in the grid: Click the corresponding part of the graph.



COI Health Monitor

The COI Health Monitor, located on the homepage, represents your potential liability for each building. The following table defines the status of each color.

Color	Status
Green	Tenant or vendor with a Compliant COIs
Red	Tenant or vendor that has a Non-Compliant, Expired, or COI that is Missing a Coverage Component

Hovering over a specific COI Health Monitor displays the current COI health for that particular building. A value denoted in the **Non-Compliant, Expired, or Missing Coverage** area requires further investigation.






















*Note: The total number of **Compliant, Non-Compliant, Expired, and Missing Coverage** COIs is a one-to-one ratio of the tenants and vendors associated to a building. In some cases, there may be more than one COI associated to a tenant or vendor company. When that occurs, the monitor only displays the worst status of all the COIs. This value **does not** represent the total number of COIs linked to a building.*

The following image demonstrates a building that has three tenant and two vendor companies associated to it (five total entities). While there may be more than five COIs associated to the building, the Health Monitor only displays a single value for each entity, which is the worst status of each group of COIs for each tenant and vendor company.


Building	NEW/OPEN	COMPLETE	ON-HOLD	Actions
35 Main Street	1	8	-	Actions
Berkshire Crossing	30	7	-	Actions

The small icons displaying COI status can be found on most screens throughout the Building Engines system. Below is an example from the **Tenant Companies** page.

Note: Tenant and vendor companies that are self-insured are denoted as compliant.





 Tenant Companies 									
 Search Results Filtering 									
 SEARCH  DEFAULT VIEW  Save View  SHARE  EXPORT									
COMPANY	PROPERTY	COI	AREA	LEASE	CONTACT	PHONE	EMAIL	SUB LEASE	
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	
<input type="checkbox"/> Apple Com...	North Plaza		500,550		Tracey Beck	(555) 555-5555	na@na.com		
<input type="checkbox"/> Berkshire...	North Plaza		401		Daniel Hamilton	(555) 555-5555	na@na.com		
<input type="checkbox"/> Dell	North Plaza		400		Eileen Howard	(555) 555-5555	na@na.com		
<input type="checkbox"/> FedEx	North Plaza		201		Delores Singleton	(555) 555-5555	na@na.com		
<input type="checkbox"/> General El...	North Plaza		100		Evelyn Robinson	(555) 555-5555	na@na.com		
<input type="checkbox"/> Johnson &...	North Plaza		300		Maria Vega	(555) 555-5555	na@na.com		

Tenant and vendors may have more than one COI for a given building, or set of buildings. COI status is always displayed with the worst status as the “winning” status. This same principle applies to the components of a COI as well. For instance, if a COI has numerous compliant and current coverage components, however, has one coverage component that is either expired or non-compliant, then the COI is displayed as **non-compliant** or **expired**. The following image demonstrates a COI with a single non-compliant coverage component.



Tenant COI

Non Compliant

913

BUILDING

Berkshire Crossing

TYPE


Tenant


COMPANY


InCom Corporation


RENEWAL HISTORY


Created by renewal On 01/21/2016


 EDIT COMPLIANCE


 ADD COMMENT


 RENEW


 CLOSE


 CANCEL


 DELETE




 SHARE



 Edit Details



 Coverages 4



<input type="checkbox"/>	TYPE	INSURER	EFFECTIVE DATE	END DATE	AMOUNT	POLICY NUM	ADD'L. INS.	SUBR. WAIVED
<input type="checkbox"/>	Automobile Liability		08/14/2015	08/14/2016	<div>\$100,000</div> <div>Min \$1,000,000</div>			
<input type="checkbox"/>	Excess Liability		01/15/2016	01/15/2017	<div>\$1,000,000</div> <div>Min \$1,000,000</div>			
<input type="checkbox"/>	Garage Liability		01/15/2016	01/15/2017	<div>\$1,000,000</div> <div>Min \$1,000,000</div>			
<input type="checkbox"/>	General		01/15/2016	01/15/2017	<div>\$1,000,000</div>			

Files


The Files module is a central repository for both portfolio and building specific documents. Files are housed in folders and subfolders that are dependent upon their content and/or purpose.

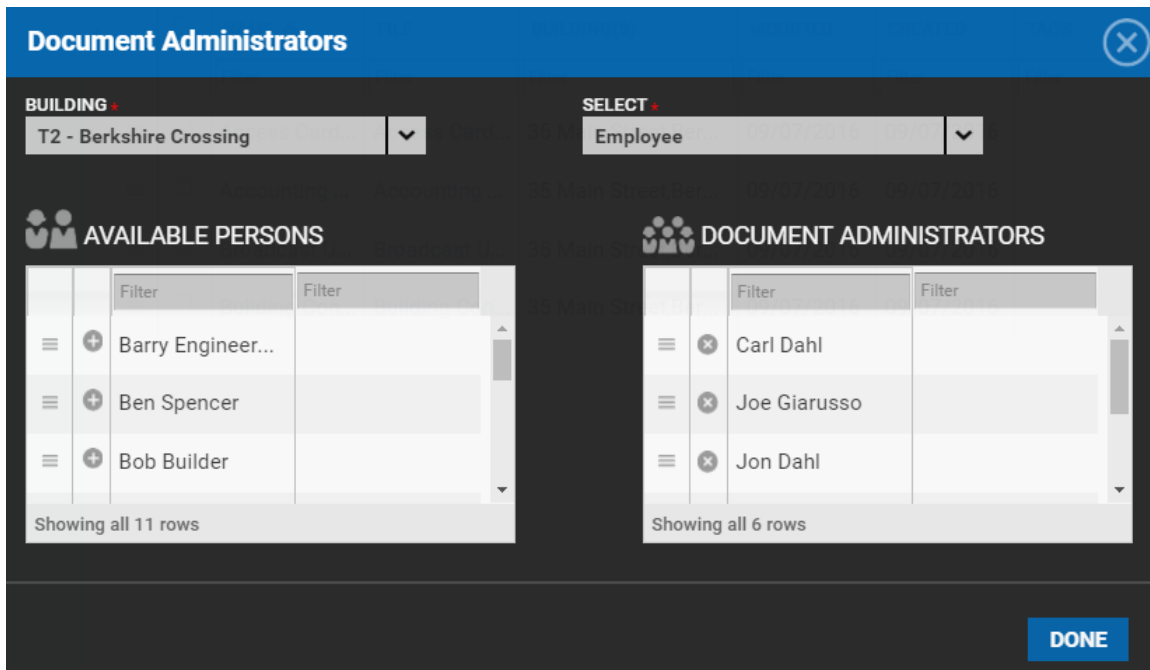
Any user designated as either a Property Manager or Coordinator has access to the file's administrative functionality. Administrative functionality allows a user to modify or delete folders, subfolders, or files that were NOT previously locked by another user.

Granting File Admin Access

Users with access to the File Admin functionality (Property Manager and Coordinator role) can grant other employees access via the **Manage Groups** button.

To grant another user access:

1. Click **Go To → Files → Files**.
2. Click **Manage Groups → Document Administrators**.
3. Using the pop up box, click either the  that corresponds to the user's name or drag and drop the name from the **AVAILABLE PERSONS** box to the **DOCUMENT ADMINISTRATORS** box.



Document Administrators																									
BUILDING: T2 - Berkshire Crossing																									
SELECT: Employee																									
AVAILABLE PERSONS	DOCUMENT ADMINISTRATORS																								
<table><tr><th></th><th>Filter</th><th>Filter</th></tr><tr><td>+</td><td>Barry Engineer...</td><td></td></tr><tr><td>+</td><td>Ben Spencer</td><td></td></tr><tr><td>+</td><td>Bob Builder</td><td></td></tr></table>		Filter	Filter	+	Barry Engineer...		+	Ben Spencer		+	Bob Builder		<table><tr><th></th><th>Filter</th><th>Filter</th></tr><tr><td>-</td><td>Carl Dahl</td><td></td></tr><tr><td>-</td><td>Joe Giarusso</td><td></td></tr><tr><td>-</td><td>Jon Dahl</td><td></td></tr></table>		Filter	Filter	-	Carl Dahl		-	Joe Giarusso		-	Jon Dahl	
	Filter	Filter																							
+	Barry Engineer...																								
+	Ben Spencer																								
+	Bob Builder																								
	Filter	Filter																							
-	Carl Dahl																								
-	Joe Giarusso																								
-	Jon Dahl																								
Showing all 11 rows	Showing all 6 rows																								
DONE																									

4. Click **DONE** to save.

Managing File Folders

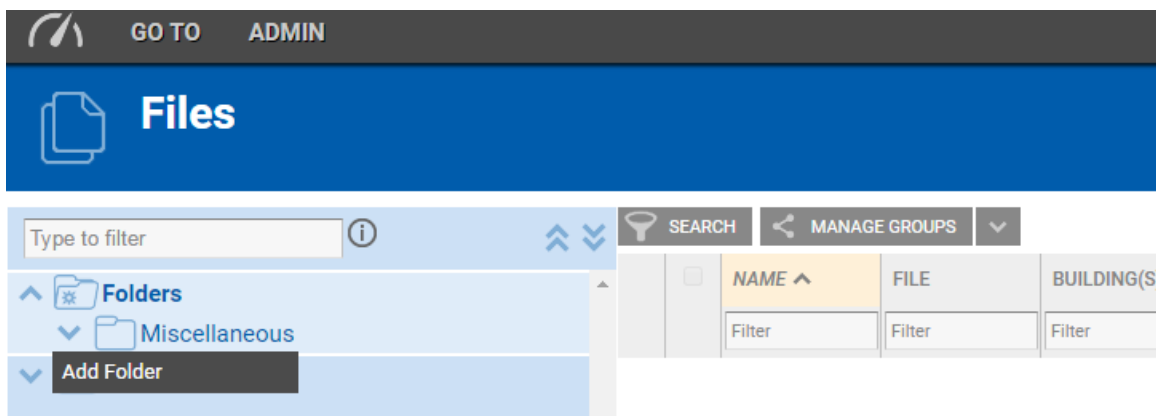
Folders and subfolders are used to create organization for the files stored within Building Engines. **The folder hierarchy is viewed the same by all users and across all buildings.** Only users with admin access are able to create, edit and delete their accounts folders and subfolders. This section describes how to create, edit, and delete folders from the desktop version of Building Engines.

Creating a Folder

This section describes how to create a new folder.

To create a folder:

1. Click **Go To → Files → Files**.
2. Navigate to the folders window, right click, and click **Add Folder**.



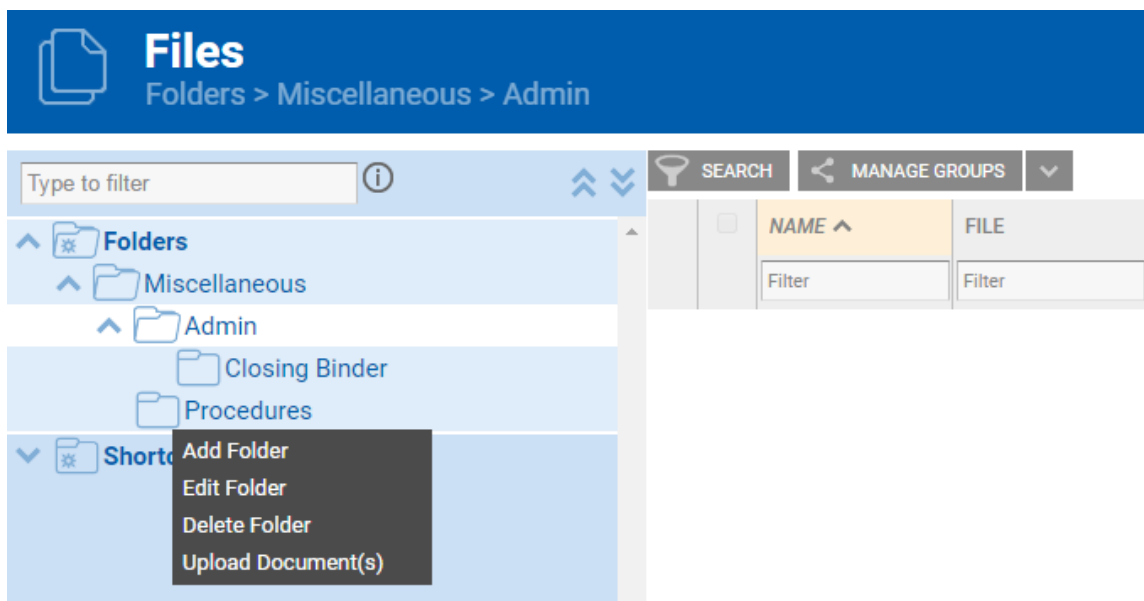
3. Enter a **FOLDER NAME**, **FOLDER DESCRIPTION**, and **PARENT FOLDER**.
4. Select the systems users who can view and edit the documents contained in the folder.
5. Click **SAVE**.

Editing a Folder

This section describes how to edit an existing folder.

To edit a folder:

1. Click **Go To → Files → Files**.
2. Navigate to the folders window, right click the folder you want to edit, and select **Edit Folder**.



3. Edit the folder or subfolder.
4. Click **SAVE**.

Deleting a Folder

This section describes how to delete an existing folder.

To delete a folder:

1. Click **Go To → Files → Files**.
2. Navigate to the folders window, right click the folder you want to delete, and select **Delete Folder**.
3. Click **DELETE** to confirm folder or subfolder deletion.

Managing Files

This section describes how to upload, delete, update, and search for the files stored in your folders.

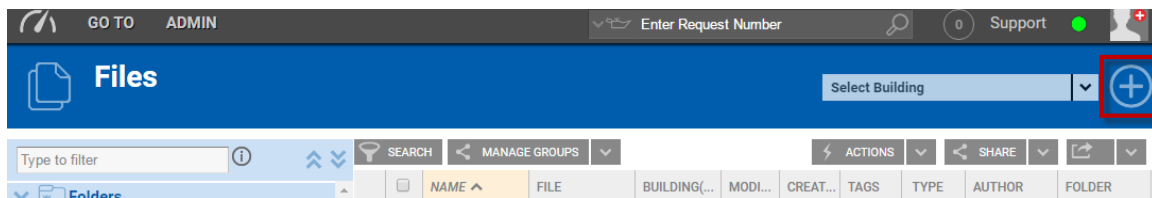
Uploading a File

This section describes the process of uploading a file.

To upload a file:

1. Click **Go To → Files → Files**.

2. Click .




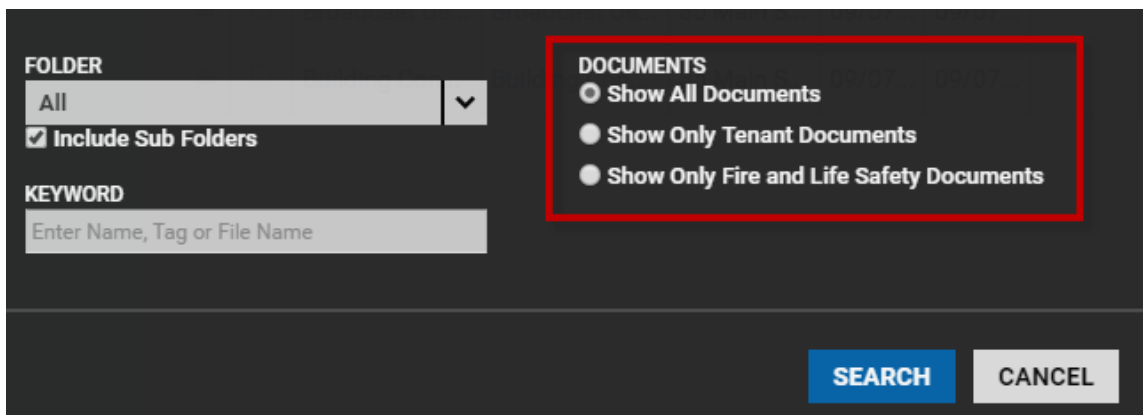
3. Using the **File(s)** pop up, enter the following file information:
 - a. **FOLDER**: Confirm the folder where the file is stored.
 - b. **LANGUAGE**: If your account is configured in multiple languages, confirm the language the file is in.
 - c. **TAGS**: Enter search tags, separated by a comma, into this field. Users will be able to search for this file at a later time using these keywords.
 - d. **ADD FILES**: To attach the file either click **ADD FILES** or drag and drop the file into the **Drag Files Here** area.
 - e. **BUILDINGS**: Select the buildings that the file can be accessed from.
 - f. **TENANT DISPLAY**: This setting allows you to distinguish which system users can access the file. You also have the ability to choose how they can access the file.
4. Click **SAVE**.

Deleting a File

This section describes the process of deleting a file.

To delete a file:

1. Click **Go To → Files → Files**.
2. Click  **SEARCH**.
3. (Optional) Using the **FOLDER** field, select the folder or subfolder where the file is stored.
4. (Optional) Using the **KEYWORD** field, enter keywords, names, or tags that are associated to the file.
5. (Optional) Select the document type that best describes the document or file you are searching for.







FOLDER
All ▼
☒ Include Sub Folders

KEYWORD
Enter Name, Tag or File Name

DOCUMENTS
☒ Show All Documents
☐ Show Only Tenant Documents
☐ Show Only Fire and Life Safety Documents

SEARCH **CANCEL**

6. Following your search, the file grid populates your results. Click the box that corresponds to the file you want to delete.
7. Click **ACTIONS**, and select **Delete Document(s)**.

SEARCH		MANAGE GROUPS		ACTIONS		SHARE				
	<input type="checkbox"/>	NAME ^	FILE	BUILDING(S)	MODIFIED	CRE	Delete Document(s) Move Document(s)		PE	AUTHOR
		Filter	Filter	Filter	Filter	Filter				Filter
≡	<input checked="" type="checkbox"/>	Access Card M...	Access Card M...	35 Main Street,B...	09/07/20...	09/07/20...				Carl Dahl
≡	<input checked="" type="checkbox"/>	Accounting Us...	Accounting Us...	35 Main Street,B...	09/07/20...	09/07/20...				Carl Dahl
≡	<input type="checkbox"/>	Broadcast Use...	Broadcast Use...	35 Main Street,B...	09/07/20...	09/07/20...				Carl Dahl
≡	<input type="checkbox"/>	Building Conne...	Building Conne...	35 Main Street,B...	09/07/20...	09/07/20...				Carl Dahl

8. Click **DELETE** to confirm.
9. (Optional) Files can also be deleted by clicking **DELETE** from within the file record.

Updating a File

This section describes the process of updating a file.

To update a file:

1. Click **Go To → Files → Files**.
2. Click the folder or subfolder where the file is stored.
3. Click the file **NAME**.
4. In Files section, click **Replace File**.
5. Select a new file from your computer or thumb drive.
6. Click **SAVE**.

Moving a File

This section describes the process of moving a file from one folder or subfolder to another.

To move a file:

1. Click **Go To → Files → Files**.
2. Click the folder or subfolder where the file is stored.
3. Click the box that corresponds to the file you want to move.
4. Click **ACTIONS → Move Document(s)**.


SEARCH		MANAGE GROUPS		ACTIONS		SHARE			
	NAME ^	FILE	BUILDING(S)	MODIFIED	CRE		PE	AUTHOR	
	Filter	Filter	Filter	Filter	Filter			Filter	
<input checked="" type="checkbox"/>	Access Card M...	Access Card M...	35 Main Street,B...	09/07/20...	09/07/20...			Carl Dahl	
<input checked="" type="checkbox"/>	Accounting Us...	Accounting Us...	35 Main Street,B...	09/07/20...	09/07/20...			Carl Dahl	
<input type="checkbox"/>	Broadcast Use...	Broadcast Use...	35 Main Street,B...	09/07/20...	09/07/20...			Carl Dahl	
<input type="checkbox"/>	Building Conne...	Building Conne...	35 Main Street,B...	09/07/20...	09/07/20...			Carl Dahl	

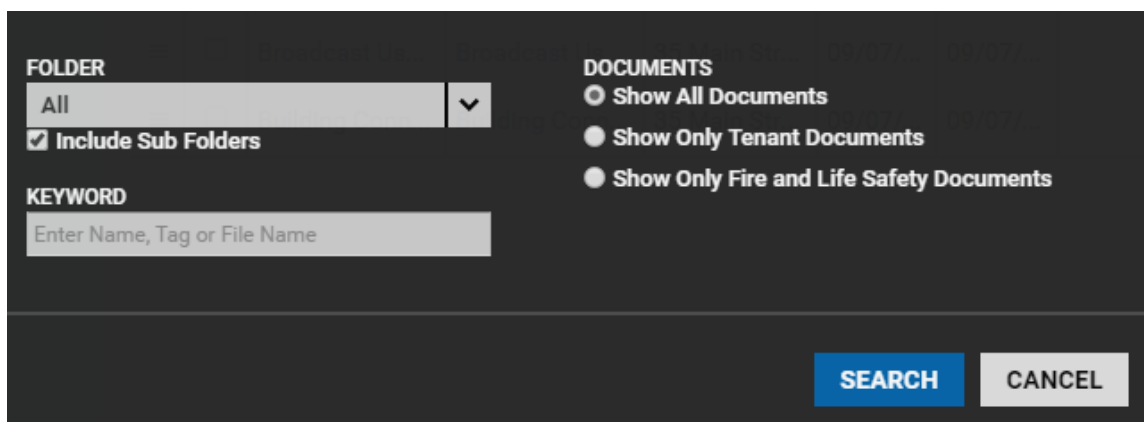
5. Using the **FOLDER** field, select the file's new folder or subfolder and click **MOVE**.

Searching for a File

This section describes the process of searching for a file.

To search for a file:

1. Click **Go To → Files → Files**.
2. Click  **SEARCH**.
3. (Optional) Select the **FOLDER** you believe the folder may be housed in.
4. (Optional) Using the **KEYWORD** field, enter file related words or tags.
5. (Optional) Using the radio buttons, filter by document type.



The screenshot shows a search interface with a dark background. On the left, under the heading 'FOLDER', there is a dropdown menu currently set to 'All' with a downward arrow. Below this is a checkbox labeled 'Include Sub Folders' which is checked. Under the heading 'KEYWORD', there is a text input field with the placeholder text 'Enter Name, Tag or File Name'. On the right, under the heading 'DOCUMENTS', there are three radio button options: 'Show All Documents' (which is selected), 'Show Only Tenant Documents', and 'Show Only Fire and Life Safety Documents'. At the bottom right of the interface are two buttons: a blue 'SEARCH' button and a grey 'CANCEL' button.

6. Click **SEARCH**.

Navigating the Shortcuts

Shortcuts were designed to give you quick access to files housed in other areas of the application. You can access tenant leases, vendor contracts, and COIs by clicking into the relevant folder or subfolder. *Note: Folders and subfolders in the shortcuts area cannot be modified or deleted.*

To locate the file shortcuts:

1. Click **Go To → Files → Files**.
2. Click the **Shortcuts** folder.
3. Locate and click the desired file. Files appear on the right side grid.

Incidents

The Incident Module creates, tracks, and reconciles incident reports. Entering incidents into Building Engines allows you to effectively capture critical information and reduce operational liability.

Creating a New Incident

This section describes the process of creating a new incident, adding relevant people, items, emergency services, photos, documents, or URLs.

Entering the Primary Incident Information

When an incident occurs, the reporter may only have access to the primary details. To facilitate this, you can either submit an incident with primary information or primary and secondary information together.

To enter the primary information:

1. Click **Go To → Incidents → Create Incident**, or select **Incident** from the **Actions** dropdown.
2. Enter the primary information which denoted with a red (*). Primary information includes: **Building**, **Type**, **Location**, and **Details**.

Create Incident

PROPERTY *
South Plaza

TYPE *
Select
No description available.

DATE OCCURRED *

FLOOR *

LOCATION *

☐ Critical
☐ Insurance Carrier Notified
☐ Reported to Police

CASE NUMBER

SUPERVISOR

DETAILS *

UPLOAD FILES

SAVE

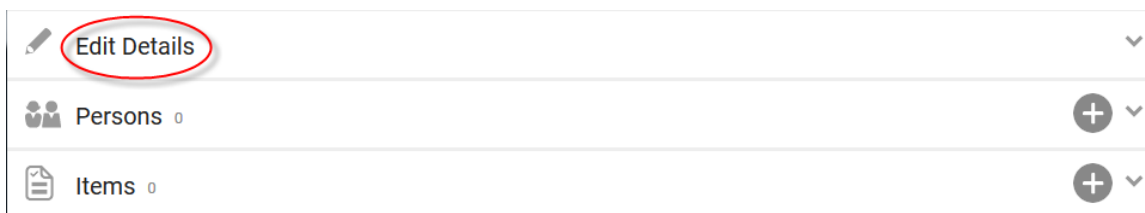
3. (Optional) Click the **Critical** and/or **Insurance Carrier Notified** button/s to provide additional, sortable, information on the search grid.
4. Click **SAVE**.

Editing Incident Information

On occasion, incident information may be entered erroneously. This section describes how to edit incident information.

To edit incident information:

1. Locate and open the incident.
2. Navigate to the **Edit Details** section and click **Edit Details**.



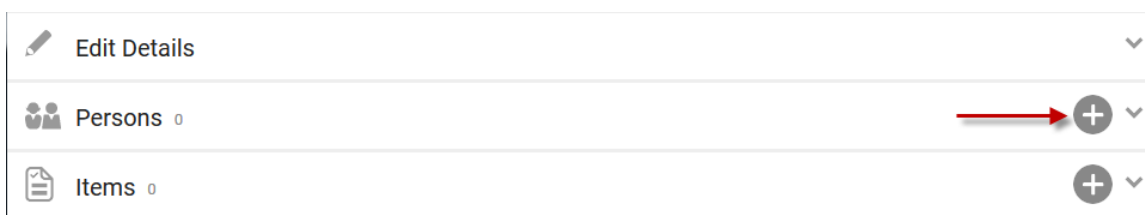
3. Correct the erroneous information, and click **SAVE**.

Adding Persons

After an incident has been created you are able to add relevant people to the incident file. Examples include: witnesses, victims, and suspects. This section describes how to add persons the incident file.

To add a person to an incident file:

1. Locate and open the incident.
2. Navigate to the **Persons** section and click the **(+)** button.



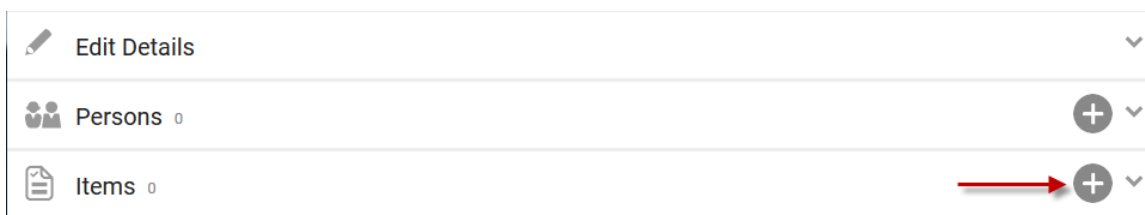
3. Enter the person's **NAME** and the **TYPE** of person they are in relation to the incident. For example: witness, victim, suspect, offender, or complainant.
4. (Optional) If available, you can also enter the person's contact information, address, and/or physical description.
5. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter in additional persons.

Adding Items

After an incident has been created you are able to add relevant items to the incident file. This section describes how to add items to the incident file.

To add an item to an incident file:

1. Locate and open the incident.
2. Navigate to the **Items** section and click the **(+)** button.



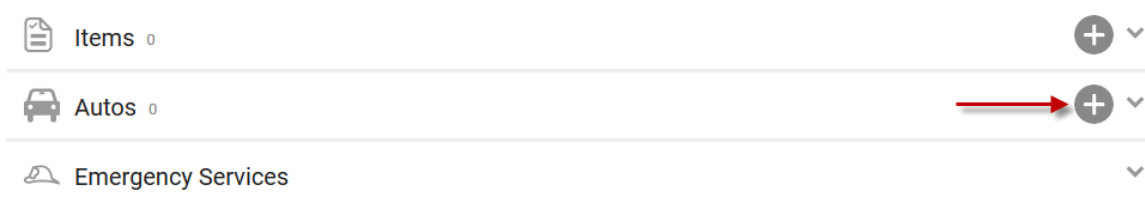
3. Enter the **NAME** of the item.
4. (Optional) If available, you can also enter the serial number and/or estimated value.
5. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter in additional items.

Adding Autos

After an incident has been created you are able to add relevant autos to the incident file. This section describes how to add an auto to the incident file.

To add an auto to an incident file:

1. Locate and open the incident.
2. Navigate to the **Autos** section and click the **(+)** button.



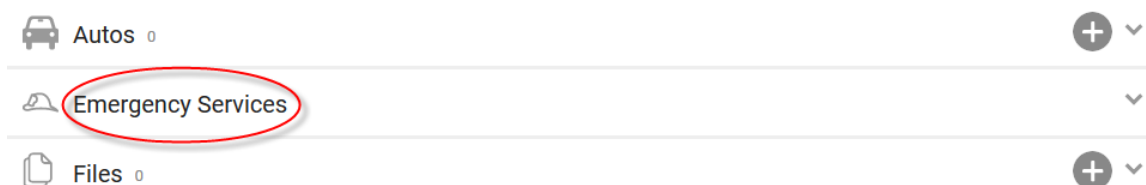
3. Enter the **MAKE** and **MODEL** of the auto.
4. (Optional) If available, you can also enter the color, year, state of registration, plate number and expiration date.
5. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter in additional autos.

Adding Emergency Services

After an incident has been created you are able to add emergency services information to the incident file. This section describes how to add emergency services to the incident file.

To add emergency services to an incident file:

1. Locate and open the incident.
2. Navigate to the **Emergency Services** section and click **Emergency Services**.



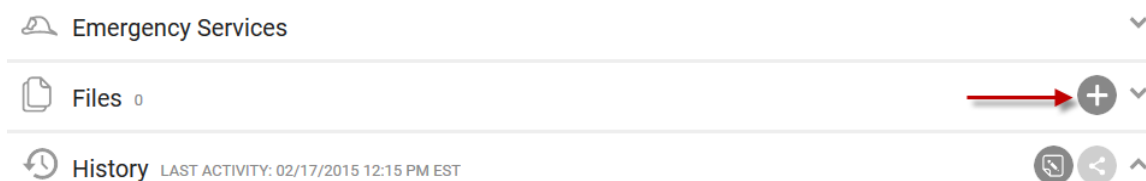
3. Enter the emergency services information, and click **SAVE**.

Adding Files

After an incident has been created you are able to add relevant files to the incident file. This section describes how to add files to the incident file.

To add a file to an incident file:

1. Locate and open the incident.
2. Navigate to the **Files** section and click the **(+)** button.



3. Click **ADD FILES**, or drag and drop files into the **Upload New File(s)** box.
4. Click **SAVE**.

Incident Dashboard

The Incident Manager dashboard provides you with customizable and sortable incident information. Using the **Search** tab and the customizable columns users can modify the information into a useful format.

Customizing the Incident Dashboard

This section describes how to customize the Incident Dashboard.

To customize the Incident dashboard:

1. Click **Go To → Incidents → Create Incident**, or select **Incident** from the **Actions** dropdown.
2. Click the **SEARCH** tab.
3. Use the incident fields to choose which information will be rendered on the incident grid and click **SEARCH**.

4. (Optional) To specify the columns and the order they are displayed on the grid:
 - a. Right click the column title bar and then select the columns you want displayed via the pop up box.

TYPE	REQUEST	BUILDING	INCIDENT TY.	FLOOR	LOCATION	DETAILS	STATUS	OCCURRED	INSURANCE
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter

- b. To rearrange the column order: left click on the column title bar and drag it into your preferred order.

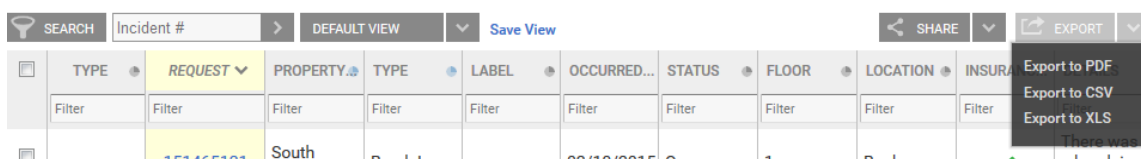
TYPE	REQUEST	PROPERTY	TYPE LABEL	OCCURRED...	STATUS	FLOOR	LOCATION	INSURANC...	DETAILS
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
	151465131	South Plaza	Break In	02/10/2015	Open	1	Bank	✓	There was a break in at the bank
	151465110	South Plaza	Vandalism	02/17/2015	New	3	South Corridor	✓	Graffiti was found on the 3rd
	151465105	North Plaza	Slip and Fall	02/17/2015	New	1	Lobby	✓	Visitor slipped and fell in the

Exporting the Incident Dashboard

This section describes the process of exporting the Incident Dashboard.

To export the incident dashboard:

1. Click **Go To → Incidents → Create Incident**, or select **Incident** from the **Actions** dropdown.
2. Click **EXPORT**, and select a format.



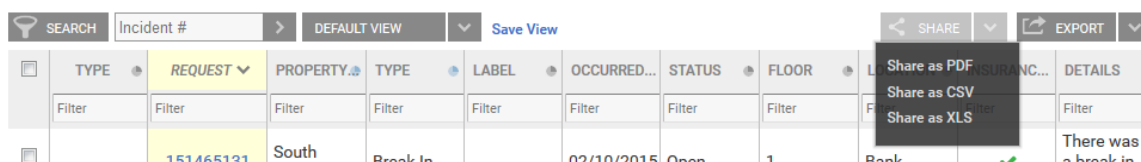
3. Exports appear at the bottom of the browser page.

Sharing the Incident Dashboard

This section describes the process of sharing the Incident Dashboard.

To share the incident dashboard:

1. Click **Go To → Incidents → Create Incident**, or select **Incident** from the **Actions** dropdown.
2. Click **SHARE** and select a format.



3. By default, **Sender Alias**, **Subject**, and **Message** are populated, however, each of these fields can be overridden.
4. Use the recipient widget to select your recipients.
5. Click **Send**.

Searching for an Existing Incident

If you want to access an existing incident file you can either search for it by using filters to narrow down the list of incidents, or by entering the incident number directly in to the **Incident #** field. Both methods are described in this section.

To search for an existing incident file using the search fields:

1. Select a value from the Incident column on the homepage.

Type to filter		SORT BY A-Z																		
North Plaza		NEW/OPEN	6	0	1	3	5	0	0	1	0									
		COMPLETE	4	0	0	2														
		ON-HOLD	-	-	-	-														
		Actions																		
Washington Avenue		NEW/OPEN	3	147	0	2	0	0	0	0	0									
		COMPLETE	0	0	0	0														
		ON-HOLD	-	-	-	-														
		Actions																		

2. Click **SEARCH**.
3. Use the incident fields to choose which information will be rendered on the incident grid and click **SEARCH**.

PROPERTYTYPE - 2(ALL)

All

ISSUE TYPE

All

SEARCH DETAILS/HISTORY

Ex. cleaning crew + night watch

STATUS

2 selected

SHOW ONLY

0 Selected

LOCATION

FLOOR

DATE CREATED

Specify Period

DATE OCCURRED

Specify Period

SEARCH

Incident #

DETAILS VIEW

SHARE

EXPORT

Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<div>SEARCHCANCEL</div>									

To search for an existing incident by number:

1. Navigate to the top of the homepage, and select the incidents icon.

2. Enter the incident number into the **Request #** field, and click the magnifying glass icon.

Property Removal Pass Workflow

For buildings with secure lobbies and standard procedures for property removal, tenant administrators are now able to control the authorization for property that is leaving the building through the new Property Removal Pass module. Property Managers will also have a record of approved property removal passes.

This section describes the typical workflow between the tenant and Property Management organization.

Tenant Submits Property Pass Request

This sections describes the process a tenant employee undergoes when they want to remove company property from the building.

1. The tenant clicks **Property Removal Pass** on their tenant portal.
2. The tenant clicks **Add New Pass**.
3. The tenant enters the **Name, Email, Company**, and **Floor/Area of the requestor**, followed by the **Property Description** of the item(s) to be removed from the building.

Home Work Orders Property Removal Pass

New Property Removal Pass

[RETURN TO PROPERTY REMOVAL PASS LIST](#)

Requested By	Property Info
First Name: * Alice	Property Desc.: *
Last Name: * Walsh	
Email: * na@na.com	
Company: * Apple Computer	
Removed From	Additional Information:
Floor / Area: * Floor 5, 500	
Location: Location	

+ SAVE RESET



Copyright © 2000–2015

4. The tenant clicks **SAVE** to complete the property removal pass request. The request is then routed to the tenant administrator for approval. *Note: If a request is entered by a Tenant Administrator it is automatically entered into the **Approved** status.*

Tenant Administrator Approves or Denies Request

This section describes the process the Tenant Administrator performs after a property removal request has been submitted.

1. The tenant administrator receives a notification via email that a property removal pass request has been received.
2. The tenant administrator may “quick approve” the request through a link included in the email notification, or log into the tenant portal and click **Property Removal Pass** to view the full request.
3. If “quick approve” has been ignored, the tenant administrator reviews the details of the request and clicks the icon in the **Actions** column to approve or deny the request.

Home

Work Orders

Property Removal Pass

Admin

Property Removal Pass

Search Parameters

+ ADD NEW PASS

PRINT RESULTS

EXPAND

	Requestor	Description	Status	Expires	Actions
<input type="checkbox"/>	Alice Walsh	Company iPad #3	Pending		<div><div></div></div>

Tenant Receives Approved or Denied Request

Following the approval or denial of the request, the tenant either prints the approved request to show the guard upon exiting the building, or they may inquire about the denial with the Tenant Administrator.

If the request has been approved:

1. The tenant or guest requestor receives an email notification.

- The tenant accesses the approved property removal pass through the tenant portal, and prints a hard copy of the pass to present to the guard station upon exiting the building.

Property Management, Inc.

PROPERTY REMOVAL PASS

PASS ID: #20436282 REQUESTOR INFO

BUILDING: Commercial Street Corporate COMPANY: ABC Investments

TENANT: ABC Investments NAME: Laura Bole

DESCRIPTION OF ITEMS BEING REMOVED

Box of files
2 Binders of Documents

Authorized by Dan Allen on Jun 06, 2014 10:34 AM FOR USE BY JUN 06, 2014

Signature: _____ Date: _____

BuildingEngines
Simplifying Property Management

Guard Reviews Details of Request upon Property Exit

Before the tenant leaves the building with company property, they are to check-out at the guard station.

At check-out:

- The tenant arrives at the guard station with the property to be removed and the guard collects the printed pass and clicks the request number in the **PASS #** column.

Property Removal Pass

SEARCH

DEFAULT VIEW

Save View

SHARE

EXPORT

ACTIONS	PASS #	DESCRIPTION	REQUESTOR	COMPANY	EXPIRES	CLOSED	STATUS
	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<div><div></div><div><div></div><div></div></div></div>	151517948	Company iPad #3	Alice Walsh	Apple Computer	03/26/2015		Approved
<div><div></div><div><div></div><div></div></div></div>	151517893	Company laptop and iPad	Bob Smith	Apple Computer	03/26/2015		Approved

2. The guard approves the property removal pass by clicking **APPROVE PROPERTY EXIT**.

Property Pass Details

Request Info

PASS #:

151517948

PROPERTY DESC.:

Company iPad #3

NAME:

Walsh, Alice

ADDITIONAL INFORMATION:

EMAIL:

na@na.com

REQUESTOR:

COMPANY:

Apple Computer

COMPANY:

FLOOR / AREA:

5,500

EXPIRES:

LOCATION:

151517948

CLOSED:

Status Info

STATUS:

Approved

APPROVER:

Tracey Beck

EXPIRES:

03/26/2015

PHONE NUMBER:

(555)555-5555

AUTHORIZED ON:

02/24/2015

EMAIL:

na@na.com

AUTHORIZED BY:

Tracey Beck

History

DATE/TIME	DETAILS	ADDED BY
02/24/2015 09:51 AM	Property Pass Approved by Tracey Beck.	Tracey Beck
02/24/2015 09:31 AM	Alice Walsh requesting Property Pass.	Alice Walsh

OK

APPROVE PROPERTY EXIT

CANCEL

Tenant Administrator or Property Manager Reviews Property Pass History

During the property removal pass request process, tenant administrators and property managers are able to view the details of a request.

For tenant administrators to view a request:

1. Click **Property Removal Pass**.

Requestor	Description	Status	Expires	Actions
Alice Walsh	Company iPad #3	Approved	03/26/2015	<input type="checkbox"/>
Bob Smith	Company laptop and iPad	Approved	03/26/2015	<input type="checkbox"/>

2. Optionally, click **EXPAND** to access the search filters.
3. Click the name in the **REQUESTER** column to access the request details.

For property managers to view a request:

1. Click **Go To → Security → Property Removal Pass**.
2. Click **SEARCH** and use the search filters to locate the request.

ACTIONS	PASS #	DESCRIPTION	REQUESTOR	COMPANY	EXPIRES	CLOSED	STATUS
<input type="checkbox"/>	151517948	Company iPad #3	Alice Walsh	Apple Computer	03/26/2015		Approved
<input type="checkbox"/>	151517893	Company laptop and iPad	Bob Smith	Apple Computer	03/26/2015		Approved

3. Click the hyperlinked request number in the **PASS #** column.

Access Card Request Manager

Property management administrators are now able to manage access cards for tenants. This includes new access card requests for newly hired tenant employees, requests for the replacement of lost access cards, and requests for access cards to be deactivated when a tenant employee is terminated. The Access Card Request Manager module is also available for all building tenant accounts where Tenant Employees or Tenant Administrators can initiate access card related requests.



On the receiving end, property management administrators may track and respond to access card related requests from the Access Card Request Manager page. From here you can easily add/edit/remove an access card ID, assign charges, and close out the supporting work order.

This section describes the process of creating and completing access card requests, as well as reissuing cancelling, and editing access cards.

Creating a New Access Card Request



To create a new access card request:

1. Navigate to **Admin → Tenants → Employees**.
2. Select an employee from the **Tenant Employees** list.
3. Navigate to the **Access Cards** section and click **Access Cards**.

 Access Cards 

PROPERTY	ACCESS CARD #	REQUEST #	ACTION
North Plaza			Request Card

4. Click **Request Card**.
5. The new access card request will create a new work order on behalf of the tenant employee, and the **Action** heading will display the status *Request Pending*.




 Access Cards Successfully submitted Request #151518808. 

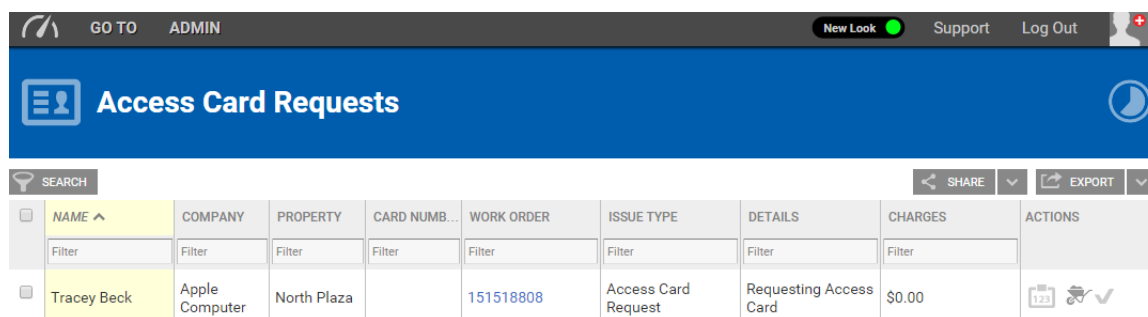
PROPERTY	ACCESS CARD #	REQUEST #	ACTION
North Plaza		#151518808 - Pending	Request Pending




Completing an Access Card Request

After the access card is requested a work order is generated in the application. To streamline the workflow, access card work orders are aggregated into the Access Card Request Manager to be assigned an access card number, invoiced, and closed out.

To complete an access card request:

1. Click **Admin → Tenants → Access Card Requests**.
2. All open access card requests will display in the Access Card Requests grid:
 - a. Click the Work Order hyperlink to access the work order for a specific access card request.
 - b. Click the  icon to provide the *Access Card Number* for the new access card request.
 - c. Click the  icon to add a billable or non-billable charge to the work order for the new access card request.
 - d. Click the  icon to complete the new access card request, with or without providing an *Access Card Number*. A request completed without providing an *Access Card Number* will not add any new access card information to the tenant employee's record.



NAME ^	COMPANY	PROPERTY	CARD NUMB...	WORK ORDER	ISSUE TYPE	DETAILS	CHARGES	ACTIONS
Tracey Beck	Apple Computer	North Plaza		151518808	Access Card Request	Requesting Access Card	\$0.00	  

Reissuing an Access Card

This section describes how to reissue an access card.

To reissue an access card to an existing tenant employee:

1. Click **Admin → Tenants → Employees**.

2. Select the tenant employee using the hyperlink in the **Name** column, or use the **Search** tab to search for the tenant employee by name, company, building.

NAME	PROPERTY	COMPANY	FLOOR	AREA	PHONE	EMAIL	LAST LOGIN	RS	PP	VC	WO	ADMIN
Beck, Tracey	North Plaza	Apple Computer	5	500	(555)555-5555	na@na.com	02/24/2015	✓	✓	✓	✓	✓
Carter, Raul	North Plaza	Toyota Motor	1	101	555-555-5555	na@na.com		✓	✓	✓	✓	✓

3. Navigate to the **Access Cards** section and click **Access Cards** to expand.
4. Select the option to *Reissue* under the **Action** heading.

⚙️ Access Cards

PROPERTY	ACCESS CARD #	REQUEST #	ACTION
North Plaza	1234567		Reissue / Cancel

5. A new Work Order is created for the request to reissue an access card. The status appears as *Request Pending*. Proceed with the steps to **“Complete an Access Card Request”**.

Canceling an Access Card



This section describes how to cancel and access card request.

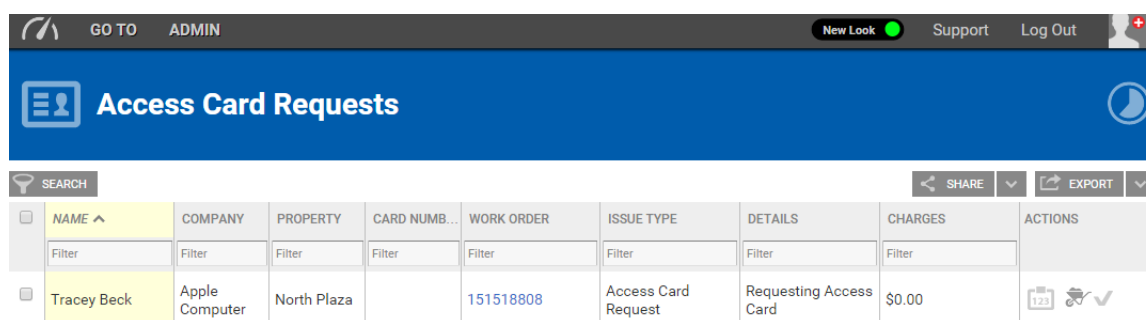
To cancel an access card:




1. Click **Admin** → **Tenants** → **Employees**.
2. Select the tenant employee using the hyperlink in the **Name** column, or use the **Search** tab to search for the tenant employee by name, company, building.
3. Navigate to the **Access Cards** section and click **Access Cards** to expand.
4. Select the option to *Cancel* under the **Action** heading:

⚙️ Access Cards

PROPERTY	ACCESS CARD #	REQUEST #	ACTION
North Plaza	1234567		Reissue / Cancel

5. A new Work Order will be created for the request to cancel the existing access card. The status will appear as *Request Pending*.
6. Click **Admin** → **Tenants** → **Access Card Requests** to view the pending cancellation request.
7. Click the  icon to remove the associated *Access Card Number*.
8. Click the  icon to complete the access card cancellation request.



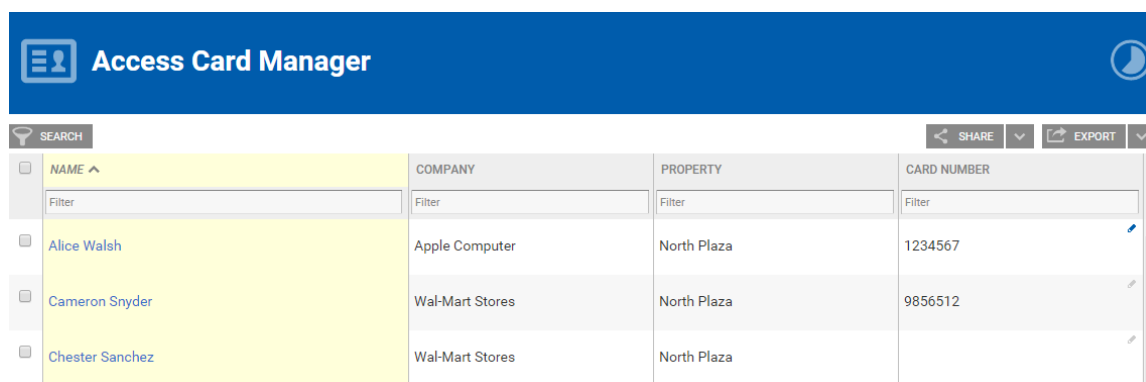
NAME	COMPANY	PROPERTY	CARD NUMB...	WORK ORDER	ISSUE TYPE	DETAILS	CHARGES	ACTIONS
Tracey Beck	Apple Computer	North Plaza		151518808	Access Card Request	Requesting Access Card	\$0.00	  




Updating an Access Card Number


This section describes how to update an existing access card.

To update an access card number from the Access Card Manager:

1. Click **Admin** → **Tenants** → **Access Card Manager**.
2. Select the tenant employee using the hyperlink in the **Name** column, or use the **SEARCH** tab to search for the tenant employee by name, company, property, or card number.



NAME	COMPANY	PROPERTY	CARD NUMBER	ACTIONS
Alice Walsh	Apple Computer	North Plaza	1234567	
Cameron Snyder	Wal-Mart Stores	North Plaza	9856512	
Chester Sanchez	Wal-Mart Stores	North Plaza		

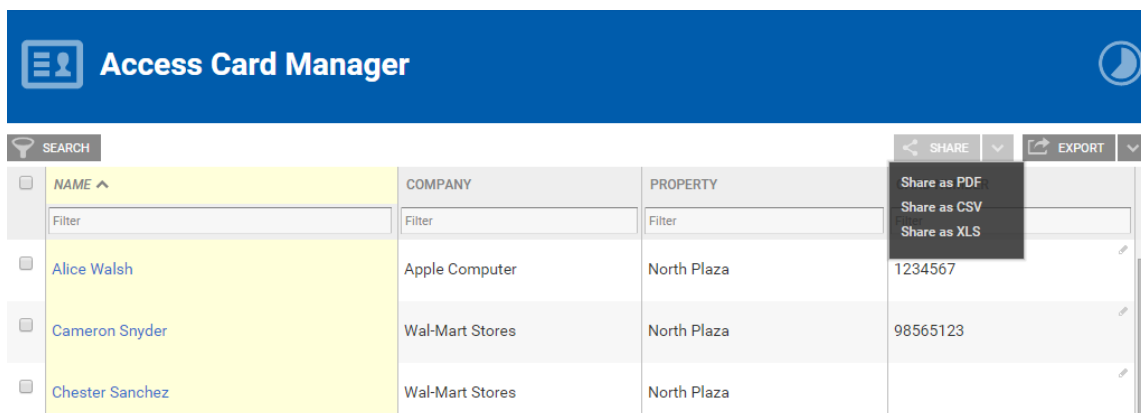
3. Click the  icon in the **CARD NUMBER** column, enter in the new number, and navigate away from the **CARD NUMBER** field. The application automatically saves the new access card number.

Sharing a List of Access Cards

This section describes how to share a pre-defined list of Access Card numbers with another individual(s).

To share a list of tenant employees and their respective access card numbers:

1. Click **Admin** → **Tenants** → **Access Card Manager**.
2. Use the **SEARCH** tab to sort by company or property.
3. Click **SHARE** and select a file format.



4. The **Share** page will open on another tab. By default, the **Sender Alias**, **Subject**, and **Message** are populated with standard information, however, this can be edited to your preference.
5. Select your recipients using the **Share** filters.
6. Click **Send** to deliver the message.

Exporting a List of Access Cards

This section describes how to export a pre-defined list of access care numbers.

To export a list of tenant employees and their respective access card numbers:

1. Click **Admin** → **Tenants** → **Access Card Manager**.
2. Use the **SEARCH** tab to sort by company or property.
3. Click **EXPORT** and select a file format.

Fire and Life Safety

The Fire and Life Safety (FLS) module is a single repository to log safety drills, store emergency documentation, and maintain emergency personnel groups.

Adding a Fire & Life Safety Document

This section describes how to add a new document to the FLS module.

To add a document:

1. Click **Go To → More... → Fire and Life Safety**.
2. Navigate to the **Documents** section and click **admin** to be redirected to the **Files** module.
3. Click **Actions**, and select **Upload Document(s)**.
4. Select a **Folder** and the **Buildings** the document is associated to.
5. (Optional) Select your **Tenant Display** preference.
6. Click **Fire and Life Safety Document**.
7. Enter the document **Title** (or name).
8. Click **Choose File** to upload the document.
9. (Optional) Enter search **Tags**.
10. Click **Save**.

Create a New Fire & Life Safety Event

This section describes how to create a new Fire & Life Safety (FLS) event.

To create an event:

1. Click **Go To → More... → Fire and Life Safety**.
2. Click **Create Event** in the **Open Events** section.
3. Enter an **Event Title**, and select the **FLS groups** that will be invited to the event.
4. Enter the **Date/Time** of the event, and indicate if a reminder is sent to the group members attending the event.
5. The notes entered will be sent in the body of the reminder (if applicable).
6. Click **Create New Event**.

Manage Fire & Life Safety Groups

This section describes how to manage Fire & Life Safety (FLS) groups.

To edit a group:

1. Click **Go To → More... → Fire and Life Safety**.
2. In the **FLS Groups** section, select a group you would like to edit and use the links provided to make the appropriate actions.
 - a. Click **Edit** to manage the members of the group.
 - b. Click **Message** to send an email to the FLS group.
 - c. Click **List** for a PDF Report of the group members.
 - e. Click **Audit** for a PDF Report of the users that includes information about their last login.

Reminder

The Reminder module allows you to create and send reminders in Building Engines. The section below describes how to create a new reminder.

Create a New Reminder

This section describes how to create a new reminder.

To create a reminder:

1. Click **Go To → More... → Reminders**.
2. Click **Create New Reminder**.
3. Enter a **Name, Building,** and **Due Date**.
4. Indicate the number of days prior to the due date that the notification should be sent.
5. Select a reminder **Category**.
6. (Optional) Enter reminder **Notes**.
7. Click **Continue**
8. (Optional) Attach a documents, and select the recipients who will receive the reminder email.
9. Click **Continue** again to complete the setup and return to the Reminders Dashboard.

Preventive Maintenance

Preventive Maintenance Manager provides tools to schedule and dispatch equipment maintenance and repairs, and track those repairs throughout the maintenance cycle. Additionally, standard equipment templates may be associated with specific pieces of equipment, and with industry standard maintenance tasks and schedules, assuring easy set-up and standardization.

Standard Equipment Templates

Equipment Templates allow you to define the steps and frequency of work for specific types of building equipment. Utilizing the templates allows you standardize your maintenance program and expedite any future step changes.

WARNING: All changes to Templates at the Portfolio Template Library level affect all building level equipment to which it is linked. This includes, but is not limited to, any edits, additions or deletions made to template tasks. Once equipment in multiple buildings has been associated to specific templates, any template changes should be made carefully.

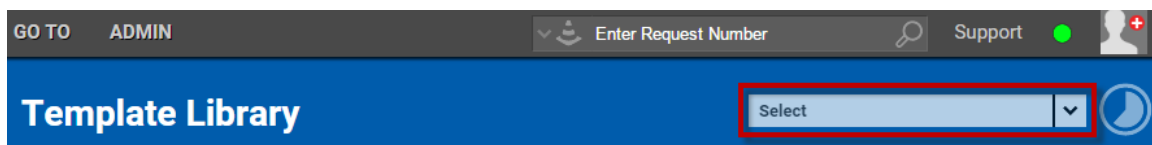
Note: You may not have access to this functionality with your existing account permissions. To add the permission, please contact your system administrator or your Building Engines Client Account Manager for details.


Creating a Preventive Maintenance Template

This section describes the process of creating a new equipment template.

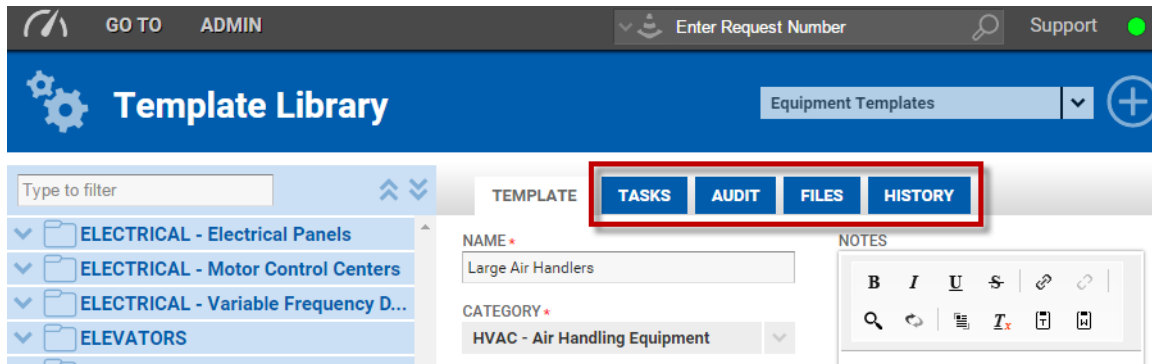
To create a new template:

1. Click **Go To → Preventative Maintenance → Template Library**.
2. Select a Template Library.



3. Click .
4. Enter a template **NAME** and select a **CATEGORY**.
5. (Optional) Use the **NOTES** box to enter additional template information.
6. Click **SAVE**.

7. After you click **SAVE**, additional tabs become available that allow you to complete the template setup. All information added at the template level is automatically carried down to the equipment tied to the template.



- a. **TASKS** – add periodic maintenance tasks to the template.
- b. **AUDIT** – review building equipment that is currently connected to the template.
- c. **FILES** – add or view any documents attached to the template.
- d. **HISTORY** – review date/time stamped history for template activity.

Managing Tasks in the Portfolio Template Library


This section describes the process of modifying an existing equipment template.

WARNING: All changes to Templates at the Portfolio Template Library level will affect all building level equipment to which it is linked. This includes, but is not limited to, any edits, additions or deletions made to template tasks. Once equipment in multiple buildings has been associated to specific templates, any template changes should be made carefully.

To manage an existing template:

1. Click **Go To → Preventative Maintenance → Template Library**.
2. Select a Template Library.
3. Using the list of templates on the left side, select the template you want to edit.
4. Click the **TASKS** tab.



5. Click , and select **New Task**.
 - a. Enter a **NAME** for the task.
 - b. Enter the **COMPLETE IN (DAYS)**. *Note: When a task remains open beyond the specified amount of **Complete In days** it becomes overdue.*
 - c. (Optional) Enter the **EXPECTED (HRS)** the task takes to complete.
 - d. Select a **FREQUENCY**.
 - e. (Optional) Add **NOTES, STEPS, PARTS AND TOOLS**, and **METER READINGS** to populate the body of the task.
6. Click **SAVE**.

To edit a task:

1. Open an existing task.
2. Make edits as necessary and click **SAVE**.

To delete a task:

1. Open an existing task.
2. Scroll to the bottom of the task and click **DELETE**.

To audit which equipment is currently connected to the template:

1. Open an existing task.
2. Click **AUDIT**.
3. View equipment list.

Searching for a Preventive Maintenance Template

This section describes how to search for an existing preventive maintenance template.

To search for a template:

1. Click **Go To → Preventive Maintenance → Template Search**.
2. Click **SEARCH** or use the column filters to locate the desired template.

Configuring PM Equipment and Tasks

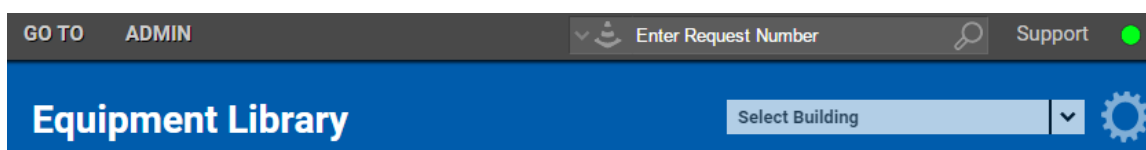
This section describes the process of adding new equipment, creating schedule and unscheduled tasks, associating templates, and adding documents.


Adding New Equipment

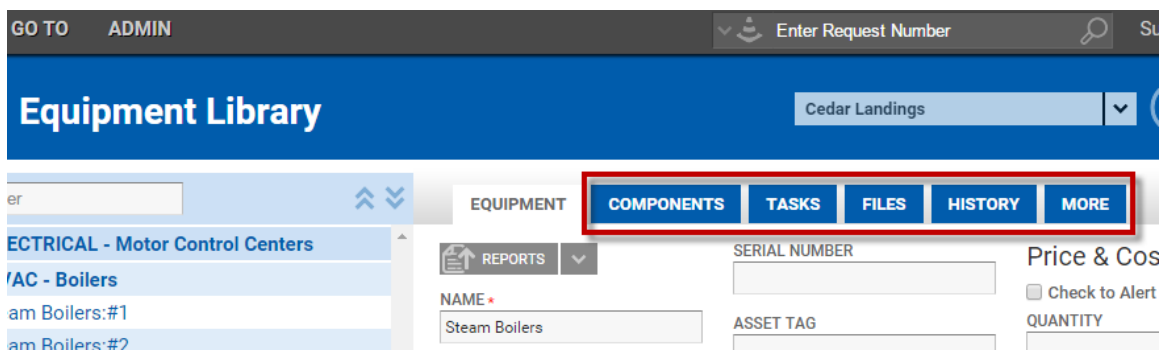
Equipment can be added to a building via two ways. You can either create the equipment from scratch, or leverage the copy feature in the Portfolio Template Library.

To create a piece of equipment from scratch:

1. Click **Go To → Preventative Maintenance → Equipment Library**.
2. Select a building from the building field.



3. Click .
4. Enter the equipment **NAME** and **CATEGORY**.
5. (Optional) Add any additional details as they are available (Location, Make, Model, Serial Number, etc.).
6. Click **SAVE** to create the equipment record, and unlock the equipment tabs.



To copy a piece of equipment from the Template Library:

1. Click **Go To → Preventative maintenance → Equipment Setup**.
2. Select the **Destination Property** and the template **Category** that the equipment template is being copied to.

- Click **Search**, and the templates from the selected category appear.

- Enter the equipment number in the **Counts** field, and click **Next ->**.
- Enter a **Name** and **Location** for the new pieces of equipment.
- Select an **Assignee**, and click **Finish**.

Searching for Equipment

This section describes how to locate a piece of equipment in your equipment library. To search for a piece of equipment:

- Click **Go To → Preventative Maintenance → Equipment Search**.
- Use the **SEARCH** or column filters to locate the desired piece of equipment.

Associating a Piece of Equipment to a Template

Associating a piece of equipment to a template pushes all of the template tasks to the piece of equipment. This section describes associating a template to a piece of equipment.

To associate a piece of equipment to a template:

- Click **Go To → Preventative Maintenance → Equipment Search**.

2. Use the **SEARCH** or column filters to locate the desired piece of equipment.
3. Select the piece of equipment from the search grid.
4. Click **MORE**, and select **Template**.

The screenshot shows the 'EQUIPMENT' tab selected in the top navigation bar. Below the navigation bar, there are several input fields: 'NAME' (containing 'Exhaust Fan, Belt-Driven'), 'STATUS' (set to 'Operational'), 'SERIAL NUMBER', 'ASSET TAG', 'VENDOR', 'QUANTITY', and 'COST LIMIT %'. A dropdown menu is open from the 'MORE' button, showing options like 'Capital Planning' and 'Template'.

5. Select an **EQUIPMENT** template and click **ASSOCIATE**.


The screenshot shows the 'Template Management' dialog box. It contains a 'PROMOTE' button and an 'ASSOCIATE' button. The 'ASSOCIATE' button is highlighted. The dialog box also includes a 'CANCEL' button and a dropdown menu for selecting an equipment template. The dropdown menu is open, showing options like 'Exhaust Fan, Belt-Driven' and 'Exhaust Fan, In-Line, Direct Drive'.





6. The piece of equipment is now be linked to the selected template and any tasks on this template are automatically copied to the piece of equipment.
7. To remove an association from this template, click **DISASSOCIATE**. *Note: your access level may not allow you to view the **Template** tab.*


Adding a Task to Equipment


This section describes how to add an additional task to a piece of equipment.

To add a task:

1. Click **Go To → Preventative Maintenance → Equipment Search**.
2. Use the **SEARCH** or column filters to locate the desired piece of equipment.
3. Select the piece of equipment from the search grid.
4. Click the **TASKS** tab.
5. Click , and select **New Task**.

EQUIPMENT COMPONENTS TASKS FILES HISTORY MORE						
<input type="checkbox"/>	TASK	OCCURS	NEXT	ASSIGNED TO	SEASONAL	    <div> New Task New Unschedule... New Inspection ... </div>
<input type="checkbox"/>	Exhaust Fan, Belt Driven	Semi-Annual	09/02/2014	Joe Giarusso		

6. Enter the task **NAME**, **NEXT (fire) DATE**, **COMPLETE IN (DAYS)**, **EXPECTED (HRS)**, **FREQUENCY**, and **ASSIGNEE**.
7. (Optional) Add **NOTES**, **STEPS**, **PARTS AND TOOLS**, and **METER READINGS**.
8. Click **SAVE**.
9. (Optional) To delete a task, select the box next to the **TASK** and click .

EQUIPMENT COMPONENTS TASKS FILES HISTORY MORE						
<input checked="" type="checkbox"/>	TASK	OCCURS	NEXT	ASSIGNED TO	SEASONAL	TYPE
<input checked="" type="checkbox"/>	Exhaust Fan, Belt Driven	Semi-Annual	09/02/2014	Joe Giarusso		

Creating an Unscheduled Task

Unscheduled tasks may be used to document unplanned repair work performed on a piece of equipment during the course of other maintenance. Unscheduled tasks may be created from the PM task or from the equipment record.

To create an unscheduled task from within a PM task:

1. Click **ADD UNSCHEDULED**.



2. Enter a **NAME** for the task, select an **ASSIGNEE**, and enter the number of days allotted to complete the work. Additional task notes can be entered in the **NOTES** field.

3. Click **SAVE**.

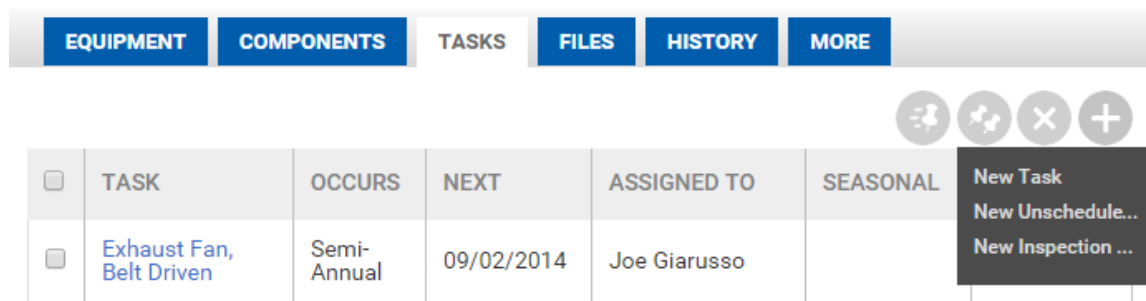
Creating an Unscheduled Task from the Equipment Record

If a problem is discovered with a piece of equipment and an open PM task does not exist, an unscheduled task can be created from the equipment record.

To create an Unscheduled Task:

1. Click **Go To → Preventative Maintenance → Equipment Search**.
2. Use the **SEARCH** or column filters to locate the desired piece of equipment.
3. Select the piece of equipment from the search grid.
4. Click the **TASKS** tab.

5. Click , and select **New Unscheduled Task**.




6. Enter a **NAME** for the task, select an **ASSIGNEE**, and enter the number of days allotted to complete the work. Additional task notes can be entered in the **NOTES** field.
7. Click **SAVE**.

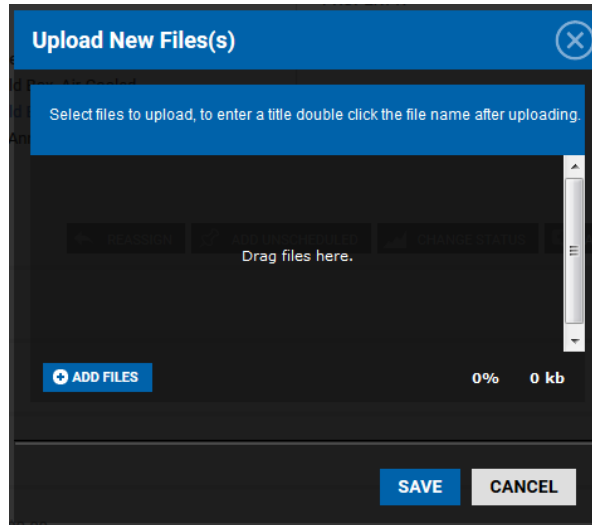
Adding a File to Piece of Equipment

The Files tab allows you to add documents, pictures, schematics, and videos to a piece of equipment's tasks. These resources can be accessed as a reference via the mobile application when the equipment is being serviced.

To add a file to a piece of equipment:

1. Click **Go To → Preventative Maintenance → Equipment Search**.
2. Use the **SEARCH** or column filters to locate the desired piece of equipment.
3. Select the piece of equipment from the search grid.
4. Click the **FILES** tab.
5. Click .

6. Use the **ADD FILES** function to access your computer hierarchy and select the document you wish to attach, or drag and drop the file into the window.



7. Click **SAVE**.

Managing PM Tasks

This section describes the common day-to-day functionality associated with maintaining your preventive maintenance program.

Using the Preventive Maintenance Task Calendar

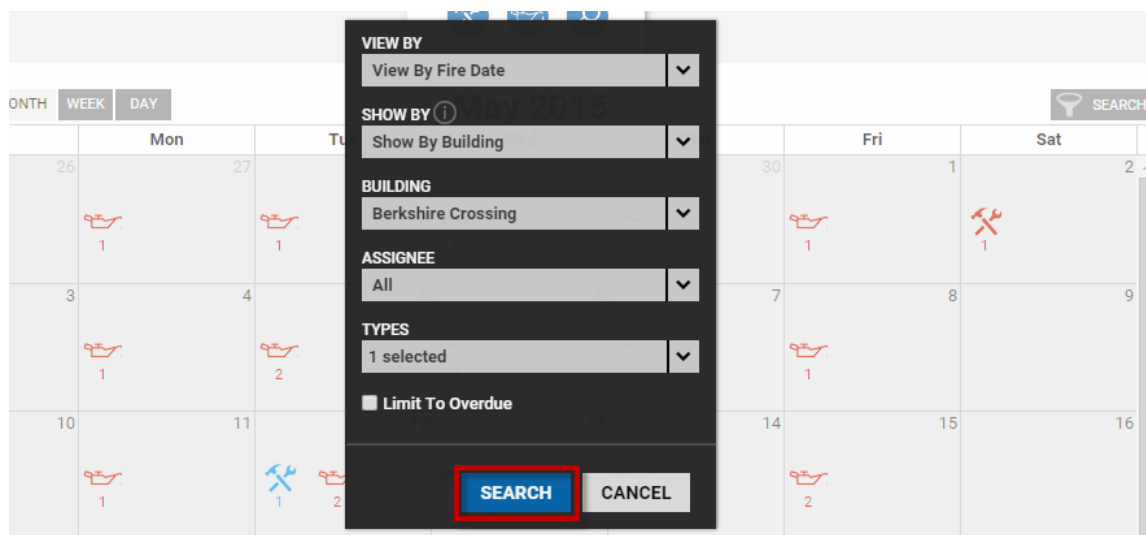
The task calendar provides you with a monthly, weekly, and daily breakdown of the preventive maintenance tasks assigned to you and your colleagues.

Note: For full functionality instruction on the Task Calendar, see the section labeled Task Calendar.

To access the task calendar:

1. Click **Go To → Task Calendar**.
2. Click **SEARCH** and select a **BUILDING**.
3. (Optional) Use the additional **SEARCH** fields to filter the calendar by due date, task type, and assignee.

4. Click **SEARCH**.

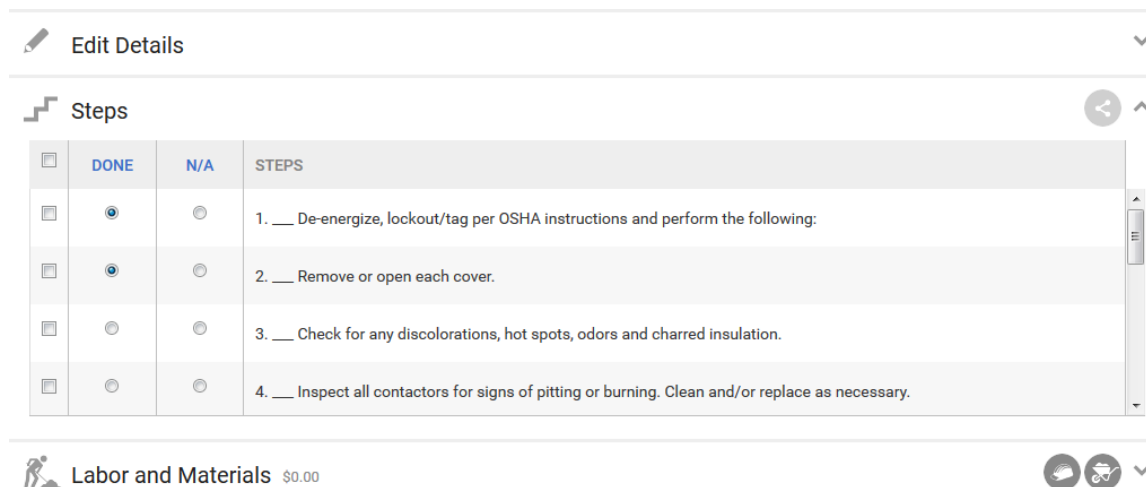


Completing the Steps on a Preventive Maintenance Task

This section describes the process of completing the steps on a preventive maintenance task from the desktop version of the application.

To complete the steps on a PM task:

1. Navigate to the specific New or Open PM Task.
2. Click the **Steps** section to expand.
3. As steps are completed, click either **Done** or **N/A** (Not Applicable). *Note: Certain **Steps** may be required before the PM Task may be changed to the Completed status.*





Entering Meter Readings on a Preventive Maintenance Task

This section describes the process of entering the meter readings that are associated to the preventive maintenance tasks.

To enter meter readings on a PM task:

1. Navigate to the specific New or Open PM Task.
2. Click the **Meter Readings** section to expand the field.
3. Enter the meter readings into the provided fields.

 Meter Readings 

READINGS	LOCATION	AMOUNT	UNITS
1. Compressor Phase 1		<input type="text"/>	Amps
2. Compressor Phase 2		<input type="text"/>	Amps
3. Compressor Phase 3		<input type="text"/>	Amps

SAVE







4. Click **SAVE**. ****WARNING!!** You MUST click **SAVE** after entering meter reading data for the application to properly save your readings** *Note: The system will alert you if any meter readings are outside of any specified range.*

Changing the Status of a Preventive Maintenance Task

This sections describes the process of changing the status of a preventive maintenance task.

To change status from the **Search Tasks** page:

1. Select the checkboxes to the left of the PM Task (or group of PM Tasks) to make a status change.
2. Click the **Actions** dropdown and select **Change Status**.

SEARCH		Request #	DEFAULT VIEW		Save View				ACTIONS		SHARE	EXPORT	
<input checked="" type="checkbox"/>	TYPE	REQUEST	PROPERTY	ASSIGNEE	STATUS	TASK	EQUIPMEN.	CATEGORY	Change Status	DUE	CHARGES	NOTE	
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Reassign	Filter	Filter	Filter	
<input checked="" type="checkbox"/>		151383214	Cedar Landings	 Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00		
<input checked="" type="checkbox"/>		151383206	Cedar Landings	 Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00		
<input checked="" type="checkbox"/>		151348039	Cedar Landings	 Joe Giarusso	Open	Motor Control Center	Motor Control Centers	ELECTRICAL - Motor Control	01/26/2015	02/25/2015	\$0.00	Due to the nature of the	

3. If changing the status to **Complete**, an option will be provided to manually set the completion date and time.
4. Change the task status, add a comment if applicable, and click **SAVE**.

To change the status from within a specific PM Task:

1. Click **CHANGE STATUS**.

Motor Control Center - #151348033
Washington Avenue - {BEI DEMO - CARL}

ASSIGNED TO: **Joe Giarusso**

STATUS: Open
TASK: Motor Control Center
EQUIPMENT: Motor Control Centers
FREQUENCY: Annually

PROPERTY: Washington Avenue
TENANT: {BEI DEMO - CARL}
CREATED: 01/26/2015 12:05 AM

Task Note:
Due to the nature of the equipment controlled by this panel, it may not be possible to completely de-energize this equipment during this inspection. Use caution when working on energized equipment.

REASSIGN ADD UNSCHEDULED **CHANGE STATUS** ADD COMMENT SHARE PRINT

2. If changing the status to **Complete**, an option will be provided to manually set the completion date and time.
3. Change the task status, add a comment if applicable, and click **Save**.

Reassigning a Preventive Maintenance Task

This sections describes the process of reassigning a preventive maintenance task.

To reassign from the **Search Tasks** page:

1. Select the checkboxes to the left of the PM Task (or group of PM Tasks) to be reassigned.
2. Click the **Actions** dropdown and select **Reassign**.

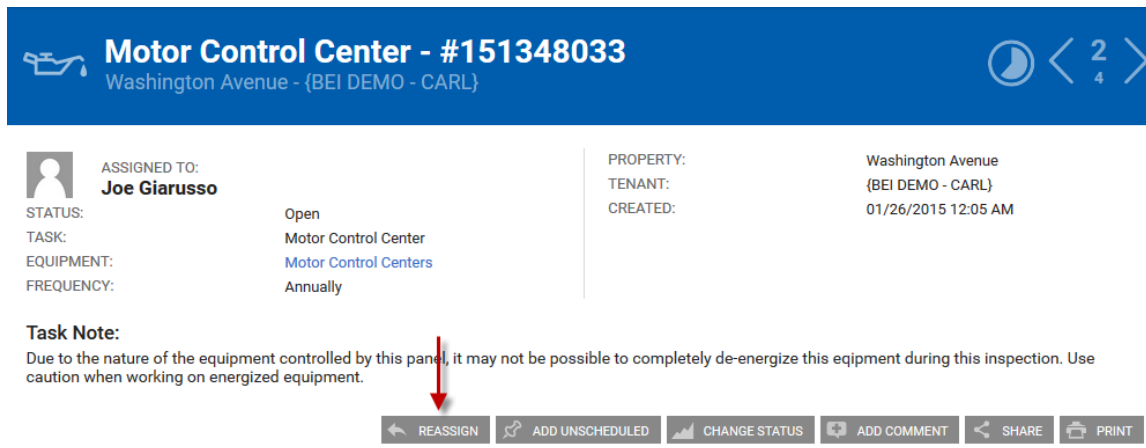
SEARCH		Request #	DEFAULT VIEW		Save View				ACTIONS		SHARE	EXPORT	
<input checked="" type="checkbox"/>	TYPE	REQUEST	PROPERTY	ASSIGNEE	STATUS	TASK	EQUIPMEN.	CATEGORY	Change Status	DATE	CHARGES	NOTE	
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Reassign	Filter	Filter	Filter	
									Print Selected				
<input checked="" type="checkbox"/>		151383214	Cedar Landings	Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00		
<input checked="" type="checkbox"/>		151383206	Cedar Landings	Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes	02/02/2015	03/04/2015	\$0.00		
<input checked="" type="checkbox"/>		151348039	Cedar Landings	Joe Giarusso	Open	Motor Control Center	Motor Control Centers	ELECTRICAL - Motor Control	01/26/2015	02/25/2015	\$0.00	Due to the nature of the	

3. In the dialog box, select the appropriate assignee, notification method, and add a message if applicable.

4. Click **SAVE**.

To reassign from within a specific PM Task:

1. Click **REASSIGN**.



Motor Control Center - #151348033
Washington Avenue - {BEI DEMO - CARL}

ASSIGNED TO: **Joe Giarusso**

STATUS: Open
TASK: Motor Control Center
EQUIPMENT: Motor Control Centers
FREQUENCY: Annually

PROPERTY: Washington Avenue
TENANT: {BEI DEMO - CARL}
CREATED: 01/26/2015 12:05 AM

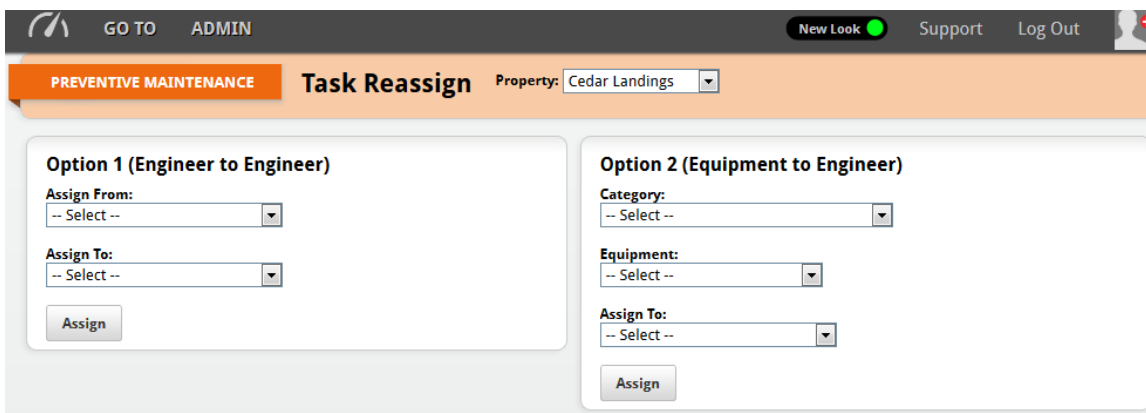
Task Note:
Due to the nature of the equipment controlled by this panel, it may not be possible to completely de-energize this equipment during this inspection. Use caution when working on energized equipment.

REASSIGN ADD UNSCHEDULED CHANGE STATUS ADD COMMENT SHARE PRINT

2. In the dialog box, select the appropriate assignee, notification method, and add a message if applicable.
3. Click **SAVE**.

To reassign a group of PM Tasks:

1. Click **Go To → Preventive Maintenance → Task Reassign**.



GO TO ADMIN New Look Support Log Out

PREVENTIVE MAINTENANCE Task Reassign Property: Cedar Landings

Option 1 (Engineer to Engineer)

Assign From: -- Select --

Assign To: -- Select --

Assign

Option 2 (Equipment to Engineer)

Category: -- Select --

Equipment: -- Select --

Assign To: -- Select --

Assign

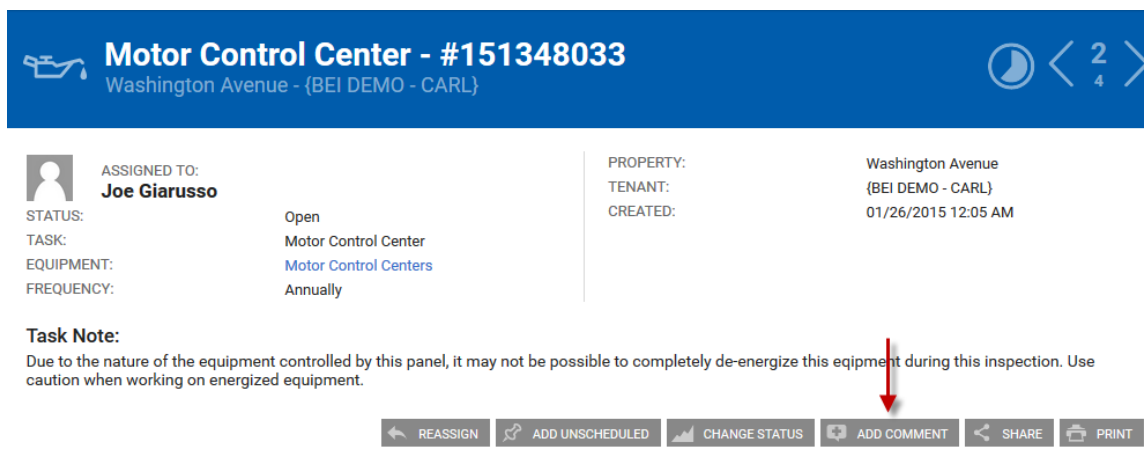
2. Select **Option 1** or **Option 2**, and click **Assign**.
 - a. **Option 1:** Assign all PM tasks from one engineer to another engineer.
 - b. **Option 2:** Assign all PM tasks for a specific piece of equipment or equipment category to a specific engineer.

Adding a Comment to a Preventive Maintenance Task

This section describes how to add a comment to a Preventive maintenance task.

To add a comment to a PM task:

1. Locate and open the PM Task.
2. Click **ADD COMMENT**.



Motor Control Center - #151348033
Washington Avenue - {BEI DEMO - CARL}

ASSIGNED TO: **Joe Giarusso**
STATUS: Open
TASK: Motor Control Center
EQUIPMENT: Motor Control Centers
FREQUENCY: Annually

PROPERTY: Washington Avenue
TENANT: {BEI DEMO - CARL}
CREATED: 01/26/2015 12:05 AM

Task Note:
Due to the nature of the equipment controlled by this panel, it may not be possible to completely de-energize this equipment during this inspection. Use caution when working on energized equipment.

REASSIGN ADD UNSCHEDULED CHANGE STATUS **ADD COMMENT** SHARE PRINT

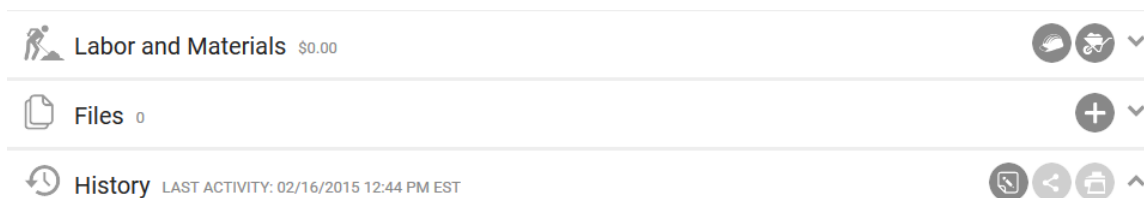
3. Enter your comment and click **SAVE**. The comment will appear with a date/time stamp in the History panel for the PM Task.
4. The comment can be marked as Internal by clicking the **Keep comment internal** checkbox.

Adding a File to a Preventive Maintenance Task

The Files section allows you to add documents, pictures, schematics, and videos to a Preventive Maintenance task.

To add a file to a Preventive Maintenance task:

1. Locate and open a Preventive Maintenance task.
2. In the **Files** section of the task, click **+**.

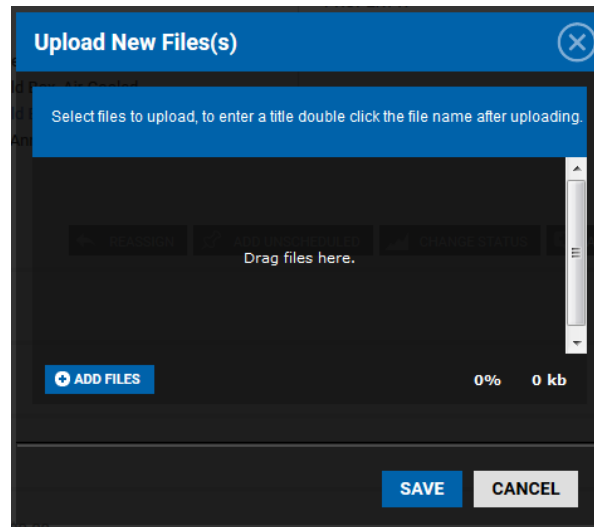


Labor and Materials \$0.00

Files 0

History LAST ACTIVITY: 02/16/2015 12:44 PM EST

3. Use the **ADD FILES** function to access your computer hierarchy and select the document you wish to attach, or drag and drop the file into the window.



4. Click **SAVE**.

Sharing a Preventive Maintenance Task

This section describes how to share a Preventive maintenance task.

To share a PM task:

1. Locate and open the PM task.
2. Click **SHARE**.
3. By default a **Subject** and **Body** are provided, however, you may edit this by clicking into the field and updating it.
4. Use the recipient selector to designate the recipients. *Note: For full Share recipient selector instruction, see: **Adding Recipients to a Broadcast or Share Message**.*
5. Click **SEND**.

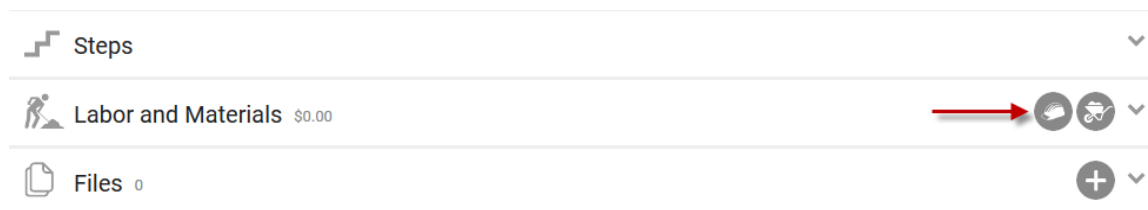
Adding Labor to a Preventive Maintenance Task

This section describes how to add labor to a preventive maintenance task.

To add labor to a PM task:

1. Locate and open the PM Task.

2. Click the **Add Labor** icon in the **Labor and Materials** section of the task.



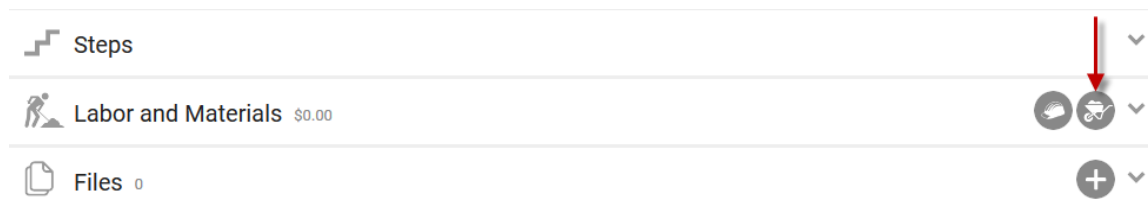
- a. From the **Name** drop down, select the name of the staff member or vendor who performed the labor.
 - b. Select the appropriate **Labor Rate**.
 - c. Enter in the number of hours.
 - d. Select a **Markup** (if applicable).
 - e. Indicate if this is a billable charge using the provided checkbox.
3. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter additional labor rates.

Adding Materials to a Preventative Maintenance Task

This section describes how to add a material to a preventive maintenance task.

To add a material to a PM task:

1. Locate and open the PM task.
2. Click the **Add Materials** icon in the **Labor and Materials** section of the task.



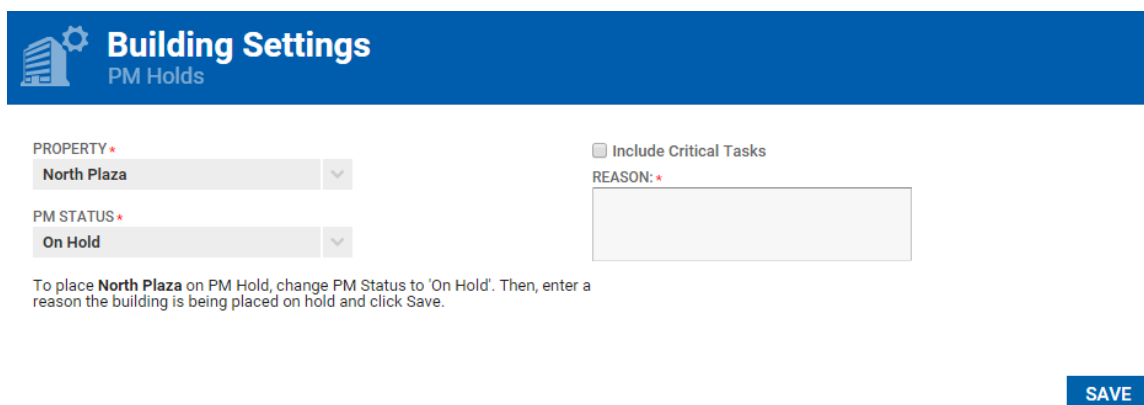
- a. Optionally, select a category to narrow the list of materials.
 - b. Select the appropriate **Material**.
 - c. Provide the quantity.
 - d. Select the **Markup** (if applicable).
 - e. Indicate if this is a billable charge using the provided checkbox.
3. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter additional materials.

Placing Preventive Maintenance on Hold

This section describes how to place an entire buildings preventative maintenance program on hold.

To place your Preventive Maintenance schedule on hold:

1. Click **Admin → Property Settings → PM Holds**.
2. Select a **PROPERTY** and change the **PM STATUS** to **On Hold**.



PROPERTY +
North Plaza

PM STATUS +
On Hold

☐ Include Critical Tasks

REASON: +

To place **North Plaza** on PM Hold, change PM Status to 'On Hold'. Then, enter a reason the building is being placed on hold and click Save.

SAVE







3. (Optional) To include critical tasks in the hold, click **Include Critical Tasks**.
4. Provide a **REASON** for the hold, and click **SAVE**.

Printing a Preventative Maintenance Task

This section describes how to print a preventive maintenance task.


To print from the **PM Tasks List** page:


1. Select the checkboxes to the left of the PM Task (or group of PM Tasks) to be printed.
2. Click the **Actions** dropdown and select **Print Selected** to generate a printable PDF.


SEARCH		Request #	DEFAULT VIEW		Save View		ACTIONS		SHARE		EXPORT		
<input checked="" type="checkbox"/>	TYPE	REQUEST	PROPERTY	ASSIGNEE	STATUS	TASK	EQUIPMEN	CATEGORY	Change Status	DUE	CHARGES	NOTE	
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Reassign	Filter	Filter	Filter	
									Print Selected				
<input checked="" type="checkbox"/>		151383214	Cedar Landings	 Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes		02/02/2015	03/04/2015	\$0.00	
<input checked="" type="checkbox"/>		151383206	Cedar Landings	 Joe Giarusso	Open	Cold Box, Air-Cooled	Cold Box, Air-Cooled	HVAC - Cold Boxes		02/02/2015	03/04/2015	\$0.00	
<input checked="" type="checkbox"/>		151348039	Cedar Landings	 Joe Giarusso	Open	Motor Control Center	Motor Control Centers	ELECTRICAL - Motor Control		01/26/2015	02/25/2015	\$0.00	Due to the nature of the

To print from within a specific PM task:

1. Locate and open the PM task.
2. Click **PRINT** to generate a printable PDF.

 **Motor Control Center - #151348033**
Washington Avenue - {BEI DEMO - CARL}

 < 2 >
4

 ASSIGNED TO:
Joe Giarusso

STATUS: Open

TASK: Motor Control Center

EQUIPMENT: Motor Control Centers


FREQUENCY: Annually


PROPERTY: Washington Avenue


TENANT: {BEI DEMO - CARL}


CREATED: 01/26/2015 12:05 AM


Task Note:
Due to the nature of the equipment controlled by this panel, it may not be possible to completely de-energize this equipment during this inspection. Use caution when working on energized equipment.





 REASSIGN

 ADD UNSCHEDULED

 CHANGE STATUS

 ADD COMMENT

 SHARE

 PRINT

Inspections

The Inspections Manager provides a centralized management system for configuring and scheduling property inspections. The inspection templates can be created for a variety of question types and styles, and include conditional and/or photo responses. Performance evaluation can be configured through scored inspections, in addition to automatic work order or PM task creation upon a failed inspection point. Dynamic Building Inspections can also be built to customized occupancy, equipment, or room type specifications.

Creating a New Inspection Template

An Inspection Template is a collection of inspection questions, response types, and requirements. Templates not only expedite the inspection setup process, but also provide standardization across your portfolio.

This section describes how to create a new building inspection template.

To create a building inspection template:

1. Click **Go To → Inspections → Template Manager**.
2. Click **Create Template**.
3. Select the **Type of Inspection** and provide a **Template Name**.

1) Details 2) Questions 3) Options

Please specify the type and name of this inspection template

Type of Inspection: *
Property Inspection

Scored Inspection: *
☐ Yes ☒ No

Template Name: *
e.g. Annual Property Inspecti

You may (optionally) choose information and prompts to appear in the header of your inspection

System Defined Header
☒ Property Address

Custom Header Questions
Enter Your Header Question
Enter Your Header Question
Enter Your Header Question
Enter Your Header Question
Enter Your Header Question

4. (Optional) To create custom header questions, click the **Customer Header Questions** field, and enter your questions.
5. Click **Save and Go To Questions** to begin creating inspection questions.

6. Select a format for your first question, enter your question in the provided field, and click **Save and add another** to continue adding additional questions. *Note: Hovering over a question type displays the question format in the **Example** area.*

7. (Optional) You can divide groups of questions into sections. To create a section:
- Click **Add Section**.
 - Enter a **Name** for the section, and click **Save**.

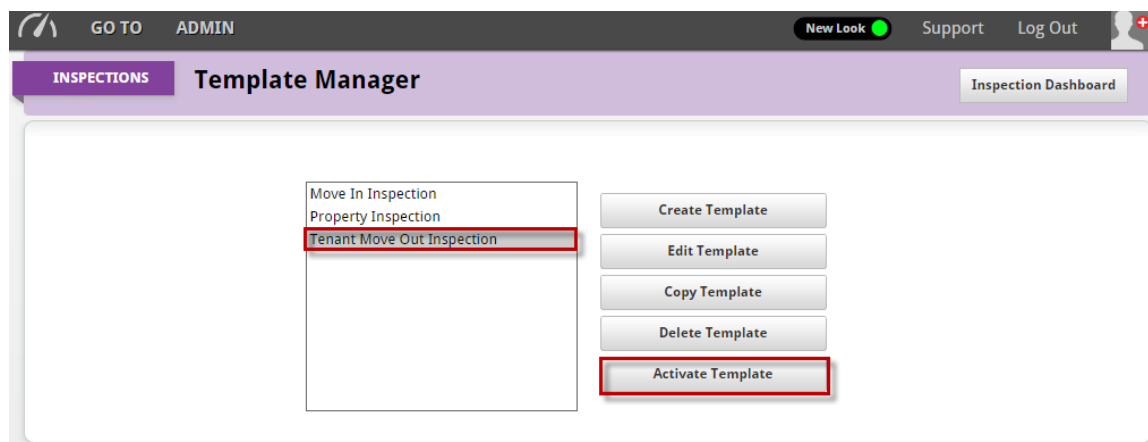
8. Once you have entered all of your inspection questions, click **Save Questions**.
9. Complete the **Inspection Completion Options**, and click **Save Template**.

Scheduling an Inspection

After an inspection template has been created you can schedule the inspection to fire immediately or on a predetermined frequency. This section describes how to schedule an inspection.

To schedule an inspection:

1. Click **Go To → Inspections → Template Manager**.
2. Click a template to schedule, and click **Activate Template**.



3. Select a target **Building(s)**, **Tenant**, and **Assignee** for the inspection.
4. Click **Schedule Inspection**.
5. Select a future date or elect to fire the task immediately. For a scheduled inspection, select an occurrence, a start date, frequency, and end date.

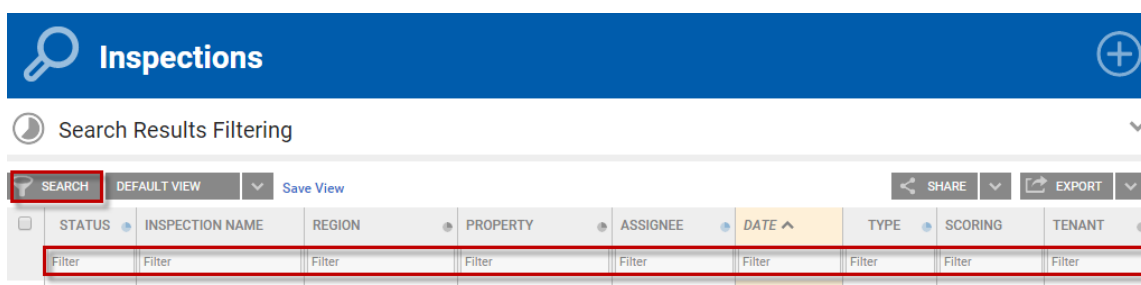
6. Click **Activate Inspection**.

Completing an Inspection

This section describes how to complete an inspection from the desktop version.

To complete an inspection:

1. Click **Go To → Inspections → Inspections Dashboard**.
2. Select a building, and click **SEARCH**.
3. If you are unable to locate your desired inspection, use the **SEARCH** button and/or column filters to narrow down your search.



4. Select an inspection via the **INSPECTION NAME** column.
5. Provide answers to the required questions, create any work orders, or attach any documents as required to complete the inspection. *Note: You may save an inspection at any point by clicking the **SAVE** located at the bottom of the inspection.*
6. Click **Save and Complete** to complete the inspection.

Dynamic Building Inspections

A Dynamic Building Inspection is an inspection that takes into consideration your building's layout. With a single template, you can setup a unique set of inspection questions and responses based on room type and occupancy. This section describes how to create your room types, setup your stacking plan, and then define each room type's inspection questions.

Managing Room Types

The first step to creating a Dynamic Inspection is to define your building's room types and layout, which is commonly referred to as the Stacking Plan.

To build out the Room Type list:

1. Click **Admin → System Labels**.
2. Select **Room Types** from the list on the left side.
3. Click Add.

4. Enter the room type **Name**, and click **Save**.

Building a Stacking Plan

After you have established your Room Types, you need to setup your building's stacking plan. This section describes the process of building a stacking plan.

To build your building's Stacking Plan:

1. Click **Admin → Building Settings → Space Management**.
2. Select a building from the **Manage Space For** field.
3. Click **Show Building Setup**.
4. Build out your building's Stacking Plan. *Note: For information regarding how to setup your stacking plan, see the **Space Management User Guide**.*

Creating a Dynamic Building Inspection Template

After your room types and Stacking Plan have been configured, you need to create a Dynamic Building Inspection Template. This type of template allows you to create a unique set of questions for each room type and occupancy status.

To create a dynamic building inspection template:

1. Click **Go To → Inspections → Template Manager**.
2. Click **Create Template**.
3. Select **Dynamic Property Inspection**.

1) Details 2) Questions 3) Options

Please specify the type and name of this inspection template

Type of Inspection: *
Dynamic Property Inspection

Scored Inspection: *
☐ Yes ☒ No

Template Name: *
Property Inspection

You may (optionally) choose information and prompts to appear in the header of your inspection

System Defined Header
☒ Property Address

Custom Header Questions
Enter Your Header Question
Enter Your Header Question
Enter Your Header Question
Enter Your Header Question
Enter Your Header Question

Save and Go To Questions

4. Enter a name for the template, using the **Template Name** field.

5. (Optional) Use the **Custom Header Questions** field to enter additional questions.
6. Click **Save and Go To Questions**.
7. To begin creating questions, click the room type, and select a question format. *Note: If you do not want to inspect a particular room type, leave the questions in that section blank.*

1) Details 2) Questions 3) Options

Please specify questions below for each room type
 When your inspection is generated, these questions will be generated for each room of that type in your Building.
 You may leave blank any room types that you do not wish to inspect

Setup Stack Plan Manage Room Types

Electrical Room

▼ Add a New Question for Electrical Room

Option-based Questions
 Multiple Answer Checkboxes
Single Answer Radio Buttons
 Single Answer Dropdown

Other Questions
 Photo Response Input
 Numeric Response Input
 Single-line Response Input
 Textbox Response Input

Example
☒ Option 1
☐ Option 2
☐ Option 3

Customize Your Question and Responses

Enter your question

☐ Require Response ☐ Require Photo

Define the responses	Optional Prompt	WO	Photo
Choice 1	Optional Prompt 1	<input type="checkbox"/>	<input type="checkbox"/>
Choice 2	Optional Prompt 2	<input type="checkbox"/>	<input type="checkbox"/>
Choice 3	Optional Prompt 3	<input type="checkbox"/>	<input type="checkbox"/>

Add Another Response

Save and add another Cancel

► Mechanical Room

8. When you have finished adding questions for each your room type, click **Save Questions**.

9. Select your **Dynamic Inspection Options**. If you have added questions for Tenant Suites, you can now indicate whether you'd like to inspect Occupied Tenant Suites, Vacant Tenant Suites, or both. You can also choose to not inspect non-tenant areas on single-tenant floors if tenants are responsible for inspecting those areas.

1) Details 2) Questions 3) Options

Please specify additional option(s) for this Inspection

Dynamic Inspection Options
If you have selected to inspect Tenant suites, would you like to:

☐ Ignore non-Tenant on floors fully occupied by a single Tenant

Inspection Completion Options
You may (optionally) prevent the completion of an Inspection if there are any open associated Work Orders.

☒ Allow Inspection to be completed with open Work Orders.
☐ Rollover open Work Orders to next scheduled Inspection.
☐ Prevent completion of Inspection with any open Work Orders.

Save Template Save and Activate

10. Click **Save and Activate** to activate your inspection template.
11. Select a **Property** and an **Assignee**, and click **Schedule Inspection**.
12. Select the occurrence, and/or frequency, and click **Activate Inspection**.

Equipment Inspections

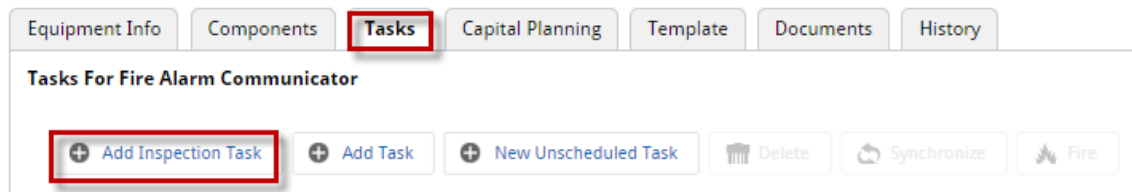
Equipment Inspections are very useful for managing daily walk-through tasks, as a partner to periodic Preventive Maintenance. Equipment inspection items are conveniently batched together into a single Inspection Task. These tasks can be managed on individual pieces of equipment, or set up for many pieces of equipment at once via the Portfolio Template Library.

Creating an Equipment Inspection

This section describes the process of creating an Equipment Inspection.

To create an Equipment Inspection Task:

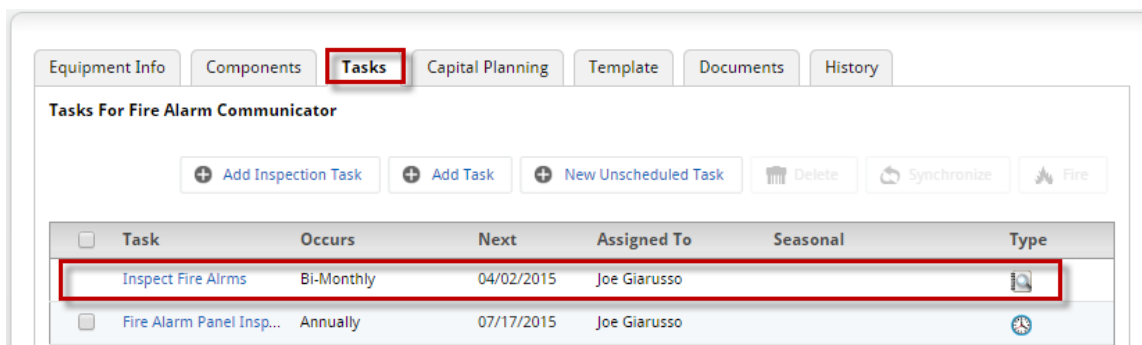
1. Navigate to the equipment record, and click **Add Inspection Task** in the **Tasks** tab.



2. Select an assignee, frequency, and the date when you would like the next inspection to occur.
3. Click **Save Task**.

To view or edit the equipment inspection from a piece of equipment:

1. Click the **Tasks** tab, and select the appropriate Inspection Task.



2. View or edit the task, and click **Save Task**.

To view or edit the equipment inspection from the task calendar:

1. Click **Go To → Task Calendar**.
2. Click **SEARCH** to locate the inspection task.
3. Click the Task name, view and/or edit, and click **Save Task**.

Equipment Inspection Workflow

After an equipment inspection fires, you have the option of completing the inspection from your desktop, or via the BE-Mobile App. This section reviews the workflow from the desktop version.

1. Equipment inspection questions are created with a Pass/Fail format.

2. If a task is marked as "Fail", the task prompts the inspector to create an Unscheduled PM Task. The following is an example of an unscheduled task.

Add Unscheduled

NAME

Inspection Failure Response

ASSIGN TO

Joe Giarusso

DAYS TO COMPLETE

1

NOTES

B I U S | **Link** | **Search** | **Undo** | **Redo** | **Text Color** | **Background Color** | **Insert Image**

Question: Evaluate the condition of Fire Alarm Communicator#1:

Response(s):

Fail

SAVE **CANCEL**

3. As each piece of equipment is inspected, the results are logged individually in the equipment history, as well as the Preventive Maintenance category in the Reports section of the application.

Scored Inspections

Scored inspections allow you to assign a score to each inspection question based upon a pre-determined range. The score of each question is then tallied up, and if the total amount doesn't meet or exceed the minimum threshold, an alert is sent to a designated recipient.

Creating a Scored Inspection

This section describes the process of creating a Scored Inspection.

To create a Scored Inspection:

1. Click **Go To → Inspections → Template Manager**.
2. Click **Create Template**.

3. Within the **Scored Inspection** area, click **Yes**.

4. Create your inspection template, and assign score points to the multiple choice answers.

5. Click **Save and add another** to create additional questions.
6. When you are finished entering questions, click **Save Questions**.
7. Set your **Minimum Score Target**.

8. (Optional) From the **Send Email To** field, select a recipient(s) to receive an escalation if the minimum score target is not achieved.
9. Click **Save and Activate** to finish the Scored Inspection template.

Cancelling an Inspection

This section describes the process of cancelling an existing inspection.

To cancel an inspection:

1. Click **GoTo → Inspections → Inspection Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the inspection you want to cancel.
3. Click the **INSPECTION NAME**.
4. Click **CHANGE STATUS**.
5. Using the Change Status dialog box, navigate to the STATUS field, and select **Cancelled**.
6. Click **SAVE**.

Visitor Module

The Visitor module allows you to monitor and report on the visitors of your building. When the Visitor Module is enabled, system users are able to register future visitors and place unwelcomed individuals on the do not admit list. As visitors enter the building they are instructed to check in at the guard station where they are recorded and given a badge. You also have the ability to run reporting at any time to review the details surrounding a guest or vendor visit to your building.

This section reviews how to register a visitor, check in a visitor, and add an individual to the Watch List from the desktop version.

Registering a Visitor

This section describes the process of adding a visitor to the daily check-in list.

To register a visitor:

1. Navigate to a building and click **Actions** → **Submit Visitor**.

The screenshot shows a table with columns for building names, status (NEW/OPEN, COMPLETE, ON-HOLD), and various counts. The 'Actions' dropdown menu is open, showing options like 'Create Work Order', 'Create Recur. Work Order', 'Closed Work Orders', 'Tenants', 'Vendors', 'Equipment Library', 'Task Calendar', 'Expected Visitors', and 'Submit Visitor'. The 'Submit Visitor' option is highlighted with a red box.

Type to filter	SORT BY A-Z										
North Plaza	NEW/OPEN	6	0	1	3	5	0	0	1	0	
Washington Avenue	COMPLETE	4	0	0	2						
South Plaza	ON-HOLD	-	-	-	-						
Cedar Landings	NEW/OPEN	3	147	0	2						
	COMPLETE	0	0	0	0						
	ON-HOLD	-	-	-	-						
	NEW/OPEN	3	0	2	1						
	COMPLETE	3	0	0	0						
	ON-HOLD	-	-	-	-						
	NEW/OPEN	1	310	0	1						
	COMPLETE	2	0	0	0						
	ON-HOLD	-	-	-	-						

2. Enter the visitor details and click **SAVE**.

Checking in a Preregistered Visitor

This section describes the process of checking in a preregistered visitor.

To check in a preregistered visitor:

1. Navigate to a building and click **Actions** → **Expected Visitors**.

The screenshot shows a table with columns for building names, status (NEW/OPEN, COMPLETE, ON-HOLD), and various counts. The 'Actions' dropdown menu is open, showing options like 'Create Work Order', 'Create Recur. Work Order', 'Closed Work Orders', 'Tenants', 'Vendors', 'Equipment Library', 'Task Calendar', 'Expected Visitors', and 'Submit Visitor'. The 'Expected Visitors' option is highlighted with a red box.


Type to filter	SORT BY A-Z									
North Plaza	NEW/OPEN	6	0	1	3	5	0	0	1	0
Washington Avenue	COMPLETE	4	0	0	2					
South Plaza	ON-HOLD	-	-	-	-					
Cedar Landings	NEW/OPEN	3	147	0	2					
	COMPLETE	0	0	0	0					
	ON-HOLD	-	-	-	-					
	NEW/OPEN	3	0	2	1					
	COMPLETE	3	0	0	0					
	ON-HOLD	-	-	-	-					
	NEW/OPEN	1	310	0	1					
	COMPLETE	2	0	0	0					
	ON-HOLD	-	-	-	-					

2. Use the **SEARCH** and column filters to locate the visitor's name.
3. Navigate to the **ACTIONS** column and click either **Check in**, **Print Badge**, or **Check In and Print Badge**.

Adding a Person to the Watch List

Adding a person to the Watch List alerts Guards not to allow a person entry into the building. *Note: If possible, it's strongly recommended that you include a picture of the person on the Watch List to help prevent barring the wrong visitor from the building.* This section describes the process of adding a person to the Watch List.

To add a person to the Watch List:

1. Click **Go To → Security → Watch List.**
2. Click .
3. Enter the **FIRST** and **LAST** name.
4. Enter in as much information as you can using the available fields.
5. Select the **BUILDING(S)** the person should be denied access to.
6. Set the **STATUS** as **APPROVED** to deny the user access.
7. (Optional) Click **Upload File** to attach a photo of the person.
8. Click **SAVE** to complete the transaction.


Property Management Employee Administration

This section describes the process of creating and inactivating an employee account, changing passwords, and updating your account information.

Adding a New Employee

This section describes how to create a new property management employee account.

To create a new employee account:

1. Click **Admin → Employees.**
2. Click .
3. (Optional) Click **"Send Welcome Email"** to send the new employee an activation link to setup their new Building Engines account password.
4. Select a **USERNAME** scheme.
5. Enter the **FIRST NAME**, **LAST NAME**, and **EMAIL.**
6. (Optional) Use the available fields to enter the person's information.
7. Select the **BUILDING(S)** the person is linked to.
8. Set the employee's **ROLE.**

9. Click **Assignable** if the person can be assigned work orders and/or preventative maintenance tasks.
10. Click **SAVE** to create the new employee account.

Inactivating an Existing Employee

This section describes the process of inactivating an employee's account.

To inactivate an employee account:

1. Navigate to **Admin → Employees**.
2. Use the **SEARCH** and column filters to locate the person's account.
3. Select their **NAME**.
4. At the bottom of the employee page, click **Inactivate**. After confirming, the employee will no longer be able to log in to the system. Unless the account is deleted, it will remain archived in the system for historical reporting purposes.

Resetting Employee Passwords

If an employee forgets their password they can either click the Forgot Password hyperlink on the login page, or you can send them an update password email from their account.

This section describes how to send them an update password email from their account.

To send an update password email:

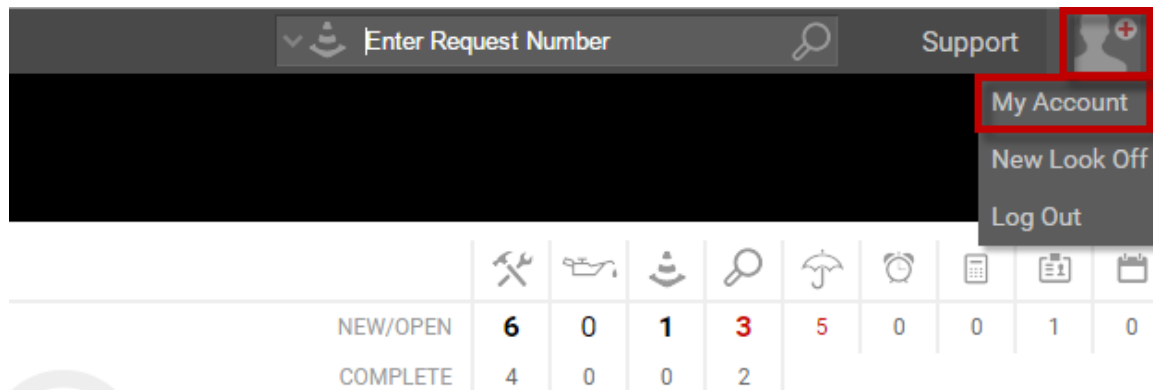
1. Click **Admin > Employees**.
2. Use the **SEARCH** and column filters to locate the person's account.
3. Select their **NAME**.
4. At the bottom of the employee page, click **CHANGE PASSWORD**.

Editing Personal Profile and Contact Details

This section describes how to update your personal account information.

To update your account information:

1. Navigate to your picture in the top right corner and select the **My Account** option.



2. Edit your information as necessary.
3. Click **Save**.

Tenant Administration

The Tenant Administration Manager provides an easy to use interface to effectively manage tenant operations in your building. Using the functionality described in this user guide you can create tenant companies, tenant user ID's, control system access, manage leases, and quickly identify gaps in liability coverage.

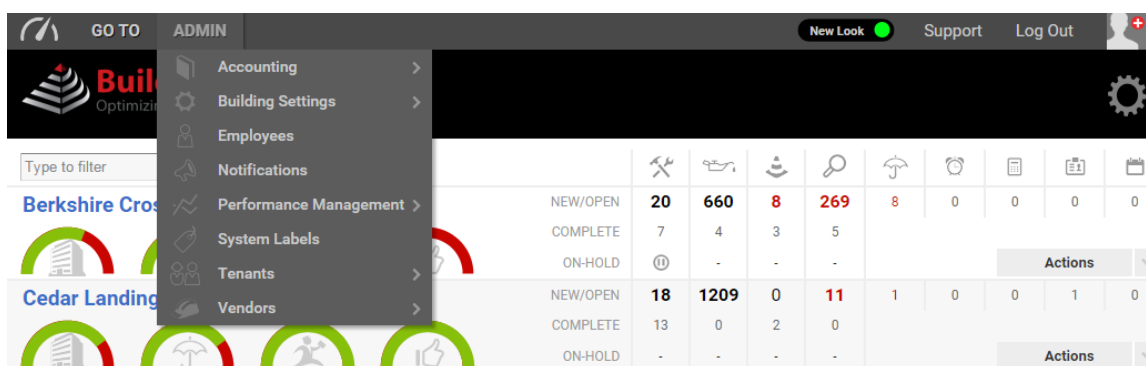
Tenant Dashboard

The tenant dashboard provides up to date information on the tenants in your building. Using the provided search grid and filters you can quickly and easily find their billing contact, location in the building, and COI and lease statuses.

Customizing the Tenant Dashboard

To customize the dashboard to display specific tenant information:

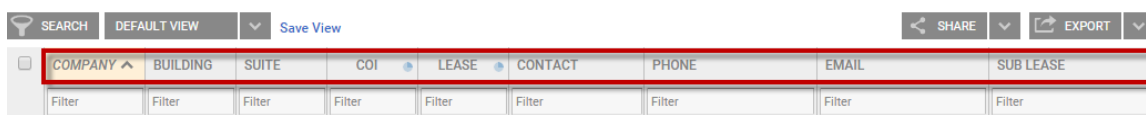
1. Click **ADMIN → Tenants → Companies.**



2. Click the **SEARCH** button to sort tenant information by building, status, COI status or lease expiration.

To add or delete columns from the tenant grid:

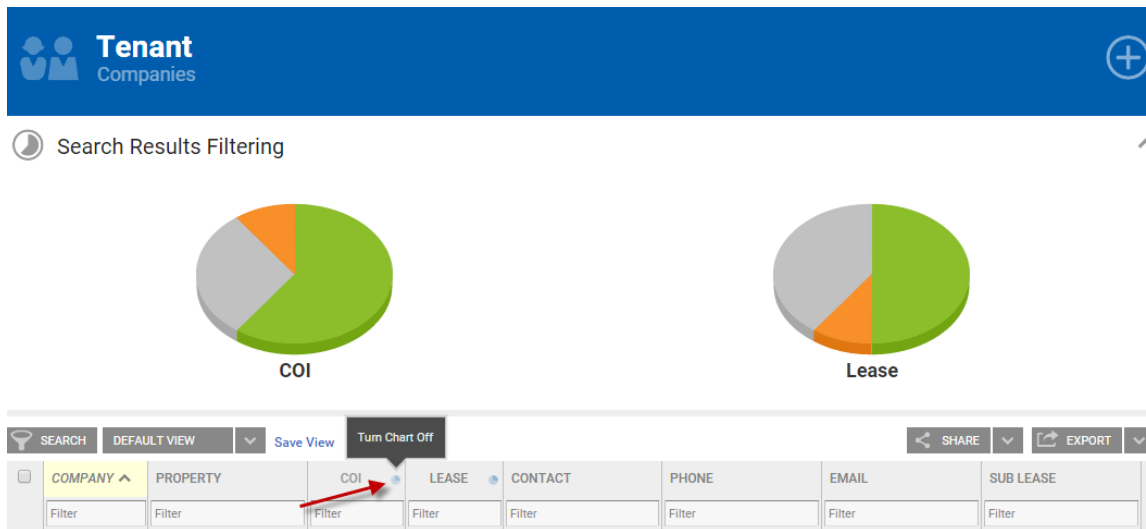
1. Click **ADMIN → Tenants → Companies.**
2. Right click on a column name.



3. Using the pop up box, choose the columns you want displayed on the grid.

To toggle the pie chart on or off:

1. Click **ADMIN → Tenants → Companies**.
2. Click the pie chart icon that corresponds to the chart you want turned on or off.




Managing Tenant Companies and Employees

This section describes the process of creating and inactivating a new tenant company, configuring a sub-lease tenant, and managing tenant employee accounts.

Creating a New Tenant Company

This section describes how to create a new tenant company from the desktop version.

To create a new tenant company:

1. Click **ADMIN → Tenants → Companies**.
2. Click .
3. Enter the new tenant information into the fields provided, and click **SAVE**.

Inactivating a Tenant Company

This section describes the process of inactivating a tenant company from the desktop version.

To inactivate a tenant company:


1. Click **ADMIN → Tenants → Companies**.

2. Use the **SEARCH** and column filters to locate the tenant company you want to inactivate.
3. Click the tenant **COMPANY** name.
4. Navigate to the bottom of the tenant record and click **INACTIVATE**.

Creating a Sub Lease Tenant Company

If you have a tenant company that is sub-leasing from another tenant you can set them up a sub-lease tenant. *Note: Sub-lease tenants can only occupy a suite that is associated to the primary tenant company.*

To create a sub-lease tenant company:

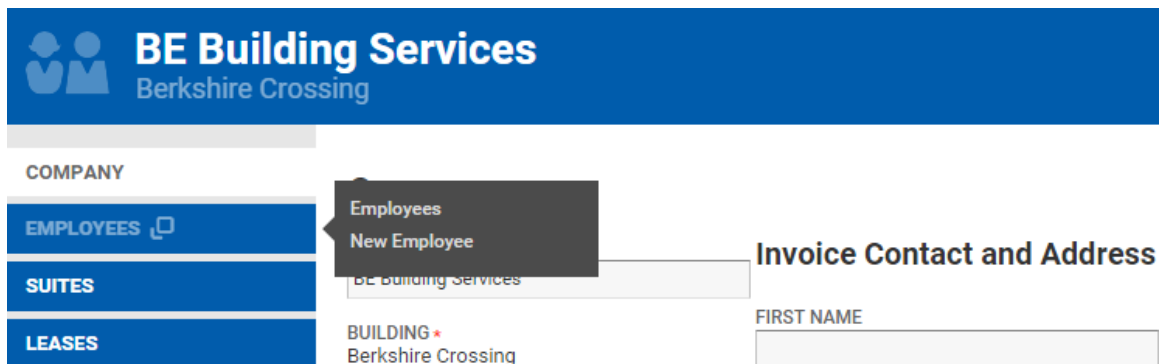
1. Click **ADMIN → Tenants → Companies**.
2. Click .
3. Enter the new tenant company information into the fields provided.
4. Select a primary tenant company from the **SUB LEASING FROM** field.
5. Click **SAVE**.

Creating a New Tenant Employee

This section describes the process of creating a new tenant employee.

To create a new tenant employee:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the tenant **COMPANY** name.
4. Hover over **EMPLOYEES**, and select **New Employee**.



The screenshot shows the 'BE Building Services' header with the 'Berkshire Crossing' logo. Below the header is a sidebar with a 'COMPANY' section containing 'EMPLOYEES', 'SUITES', and 'LEASES'. The 'EMPLOYEES' option is highlighted, and a dropdown menu is open showing 'Employees' and 'New Employee'. To the right, there is a form titled 'Invoice Contact and Address' with a 'FIRST NAME' field.

5. Use the provided fields to enter the tenant employee's information.

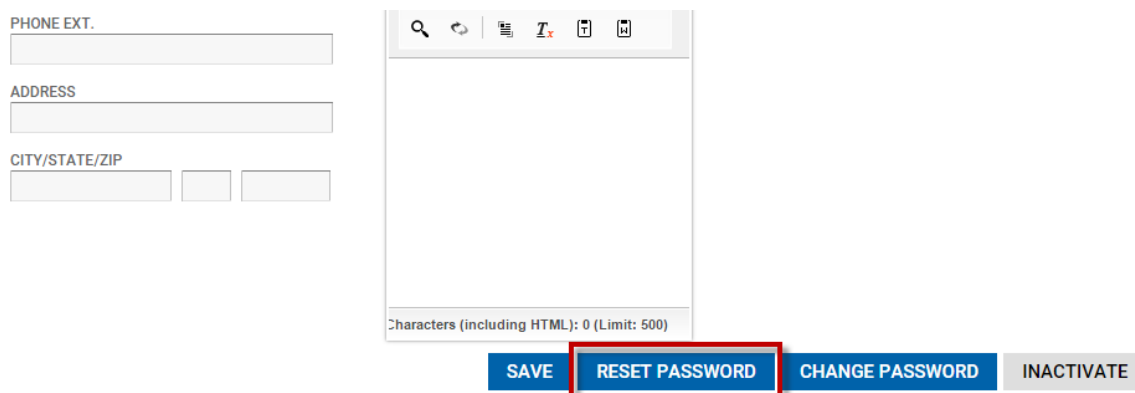
6. Select the modules the tenant employee can access, the groups they belong to, and username preference. *Note: Select **Send Welcome Email** to send the new user a welcome email after their information is saved.*
7. Click **SAVE**.

Resetting a Tenant Employees Password

This section describes the process of resetting a tenant employee password.

To reset a tenant employee password:

1. Click **ADMIN → Tenants → Employees**.
2. Use the **SEARCH** and column filters to locate the tenant employee.
3. Click the tenant employee **NAME**.
4. Navigate to the bottom of their user record and click **RESET PASSWORD**.



The screenshot displays a user profile form for a tenant employee. On the left, there are input fields for 'PHONE EXT.', 'ADDRESS', and 'CITY/STATE/ZIP'. To the right is a large text area for a bio or notes, with a character count at the bottom: 'Characters (including HTML): 0 (Limit: 500)'. At the bottom right of the form, there are four buttons: 'SAVE', 'RESET PASSWORD' (which is highlighted with a red rectangle), 'CHANGE PASSWORD', and 'INACTIVATE'.

Inactivating a Tenant Employee

This section describes how to inactivate a tenant employee.

To inactivate a tenant employee:

1. Click **ADMIN → Tenants → Employees**.
2. Use the **SEARCH** and column filters to locate the tenant employee.
3. Click the check box next to their name.


4. Click **ACTIONS**, and select **Inactivate Employees**.

SEARCH		DEFAULT VIEW		Save View		ACTIONS					
NAME	BUILDING	COMPANY	FLOOR	PHONE	SUITE	EMAIL	<div>Inactivate Employees</div> <div>Send Welcome Email</div> <div>Move Tenant Employee(s)</div>				
Filter	Filter	Filter	Filter	Filter	Filter	Filter					
<input checked="" type="checkbox"/>	Br...	Berks...	BEI Technol...	1	(555) 555-...	100A	jbrown@m...	04/16/2015	✓		
<input checked="" type="checkbox"/>	Da...	Berks...	BEI Technol...	1	(555) 555-...	100A	cdahl@mai...	07/17/2015	✓		

Adding a Suite to a Tenant Company

This section describes how to add a suite to an existing tenant company.


To add an additional suite to a tenant company:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the **COMPANY** name.
4. Click the **SUITES** tab.
5. Click  and either choose an existing vacant suite, or create a new suite.
6. Click **SAVE** or **SAVE AND ADD ANOTHER** to enter another suite.

Deleting a Suite from a Tenant Company

This section describes how to delete a suite from an existing tenant company.

To delete a suite from a tenant company:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the **COMPANY** name.
4. Click the **SUITES** tab.
5. Use the checkbox to select the suite you want to delete, and click .


COMPANY		Suites				
EMPLOYEES						
SUITES						
LEASES						
AFFILIATES						
<input checked="" type="checkbox"/>		FLOOR	TYPE	SUB LEASING TO	NAME	LEASE ID
		4	Primary Suite		550	
<input checked="" type="checkbox"/>		5	Occupied Suite		500	

6. Confirm the suite deletion by clicking **YES**.

Changing a Tenant Company's Primary Suite

This section describes how to change an existing tenant company's primary suite.


To change the primary suite of a tenant company:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the **COMPANY** name.
4. Click the **SUITES** tab.
5. Click  and choose the new primary suite.
6. Click **SAVE**.

Converting a Tenant Company into a Sub Lease Tenant

If a primary tenant company begins sub-leasing from another primary tenant company you can convert the tenant into a sub-lease tenant.

To convert an existing tenant company into a sub-lease tenant:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the tenant **COMPANY** name.
4. Click the **SUITES** tab.
5. Click  and choose a primary leaser tenant company.
6. Select a **NEW SUITE**.
7. (Optional) Click **Work Orders Require Approval** if you want to require that all new work orders receive approval from the primary leaser before being submitted.
8. Click **SAVE**.

Adding a Tenant Lease

This section describes how to add lease information to an existing tenant.

To enter lease information into an active tenant's record:

1. Click **ADMIN → Tenants → Companies**.

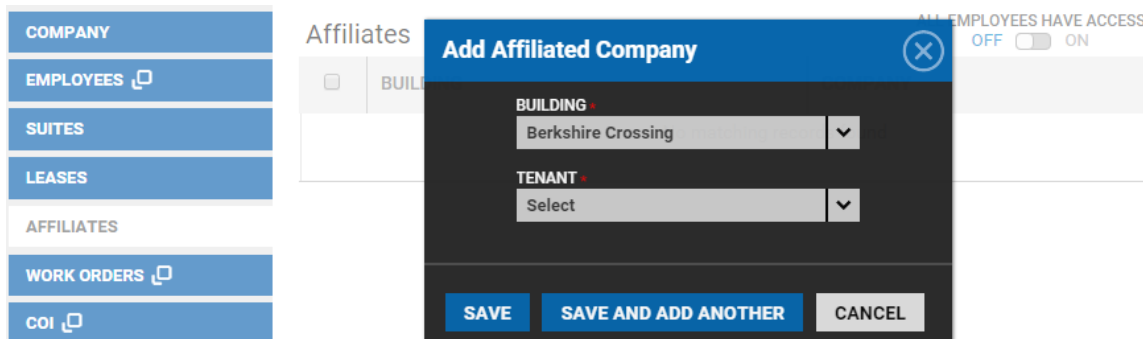
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the tenant **COMPANY** name.
4. Click the **LEASES** tab.
5. Click **+** and enter the lease information into the provided fields.
6. Click **SAVE**.

Affiliating a Tenant Company to another Tenant Company

Creating a tenant affiliate, or linking two or more tenant companies, allows designated tenant employees to submit and view work orders on behalf of another tenant company.

To affiliate a tenant company to another tenant company:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the tenant **COMPANY** name.
4. Click the **AFFILIATES** tab.
5. Click **+**.
6. Using the **Affiliated Company** pop up box, select the **BUILDING** and the affiliate **TENANT** Company.



7. Click **SAVE** or **SAVE AND ADD ANOTHER** to add additional affiliates.

Granting a Tenant Employee Access to an Affiliate Company

Following the affiliation process, tenant employees can be granted access to their affiliates. Access can be granted on a companywide level or by choosing tenant employees individually.

To give all tenant employee's access to the affiliate company:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the tenant **COMPANY** name.
4. Click the **AFFILIATES** tab.
5. Click the **ALL EMPLOYEES HAVE ACCESS** to the **ON** position. *Note: Do not slide the switch, instead click the word "ON" for access to be granted.*

To give access to an individual tenant employee:

1. Click **ADMIN → Tenants → Employees**.
2. Use the **SEARCH** and column filters to locate the tenant employee.
3. Click the tenant employee **NAME**.
4. Once in the tenant employee's account, select the **AFFILIATED COMPANIES** that the user can access.


5. Click **SAVE**.

Adding a File to a Tenant Record

You can add electronic files to an existing tenant Company record by performing the following steps.

This section describes how to add an electronic file to a tenant Company record.


To enter a file into a tenant record:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the tenant **COMPANY** name.
4. Click the **FILES** tab.
5. Click , and use the **Upload New File(s)** box to attach the file.
6. Click **SAVE**.

Adding a Meeting to a Tenant Record

You can add tenant meetings within an active tenant company record by performing the following steps.

To add a meeting into a tenant record:


1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the tenant **COMPANY** name.
4. Click the **MEETINGS** tab.
5. Click , and enter the meeting details into the provided fields.
6. Click **SAVE**.

Configuring COI Requirements at the Tenant Level

COI components, minimum amounts, and compliance questions can be configured to for a specific tenant despite a building level requirement being present. This section describes the process of configuring the COI requirement for a specific tenant.



To configure the COI requirements for a specific tenant:

1. Click **ADMIN → Tenants → Companies**.
2. Use the **SEARCH** and column filters to locate the tenant company.
3. Click the tenant **COMPANY** name.
4. Hover over the **COI** tab and click **Configure COI Coverages**.
5. Configure the template to represent the order and type of component, minimum coverage amount, and if there needs to be additional information added. Coverage components can be moved up and down by clicking on the

component, and then doing a drag and drop. To add additional components, click .

Coverage Components




Define the types of insurance coverage you require, coverage amounts and additional system validation checks for each coverage type.

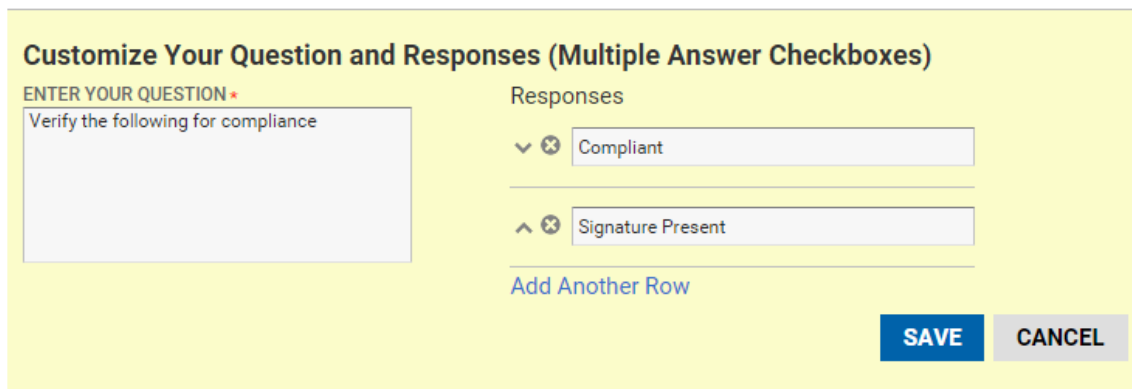
<input type="checkbox"/>	MOVE	TYPE	MIN COVERAGE	REQUIRE FOR COMPLIANCE
<input type="checkbox"/>	▼	General Liability	TENANT 0	<input type="checkbox"/> Additional Insured <input type="checkbox"/> Insurer <input type="checkbox"/> Policy Number
<input type="checkbox"/>	^ ▼	Automobile Liab	TENANT 0	<input type="checkbox"/> Additional Insured <input type="checkbox"/> Insurer <input type="checkbox"/> Policy Number
<input type="checkbox"/>	^ ▼	Garage Liability	TENANT 0	<input type="checkbox"/> Additional Insured <input type="checkbox"/> Insurer <input type="checkbox"/> Policy Number
<input type="checkbox"/>	^ ▼	Excess Liability	TENANT 0	<input type="checkbox"/> Additional Insured <input type="checkbox"/> Insurer <input type="checkbox"/> Policy Number
<input type="checkbox"/>	^	Workers Compe	TENANT 0	<input type="checkbox"/> Additional Insured <input type="checkbox"/> Insurer <input type="checkbox"/> Policy Number

SAVE

- **TYPE:** Enter the component name and order you want the component listed.
- **MIN COVERAGE:** Enter the minimum coverage for both vendors and tenants.
- **REQUIRE FOR COMPLIANCE:** Select the box which corresponds to the data you want added to each COI. *Note: The **Insurer** option is integrated with the A.M. Best Ratings. Insurers who do not meet the current A.M. Best Rating are flagged as non-compliant.*

- (Optional) Click  to add or  to delete components.
- Click **Save**.
- (Optional) To create a unique set of Compliance Questions for a particular tenant, follow steps 9-17.
- Click the **ADD'L INFO** tab.
- Click **OVERRIDE BUILDING DEFAULT**.
- Click the pencil icon .

12. Enter in your **Compliance Check(s)** (example shown below).



13. Click **SAVE**.

14. (Optional) To create a customized question, enter your question in the **Customize Your Question and Responses** field.

15. Specify the **MAXIMUM CHARACTERS**.

16. (Optional) If required for compliance, click **Require for Compliance**.

17. Click **SAVE**.


Vendor Companies and Employees

This section describes the process of creating vendor companies, vendor employees, and adding contracts.

Creating a Vendor Company

This section describes the process of creating a new vendor company.

To create a vendor company:

1. Click **ADMIN → Vendors → Companies**.
2. Click .
3. Enter the **COMPANY NAME**, select the **BUILDINGS** they're associated to, and the **SERVICES** they provide.
4. (Optional) Enter any other information you know about the vendor company using the provided fields.
5. (Optional) Click **This Company is self-insured** if you don't want to track them using the COI Manager Module.
6. (Optional) Click **This Company can be assigned tasks** if you want the vendor name listed on the assignee field of work orders and preventive maintenance tasks.

7. (Optional) Click **This Company can be messaged/notified** if you want the application to send the Vendor Contact system notifications.
8. Click **SAVE**.

Creating a Vendor Employee

This section describes the process of creating a vendor employee account.


To create a vendor employee account:

1. Click **ADMIN → Vendors → Companies**.
2. Use the **SEARCH** and column filters to locate the vendor company.
3. Click the vendor **COMPANY** name.
4. Hover over the **EMPLOYEES** tab and click **New Vendor Employee**.
5. Enter the vendor employee's information using the provided the fields, and select the **BUILDINGS** they are associated to.
6. Click **SAVE**.

Vendor Company Contracts

This section describes the process of creating a vendor contract using the desktop version.

To create a vendor contract:

1. Click **ADMIN → Vendors → Contracts**.
2. Click .
3. Select a **VENDOR**, the **BUILDING(S)** the contract is valid for.
4. Enter a contract **TITLE**.
5. Select the **RESPONSIBLE PARTY**, **SERVICE TYPE**, and **SERVICE FREQUENCY**, and **ANNUAL COST**.
6. (Optional) Use the non-essential fields to enter additional contract details.
7. (Optional) Click **UPLOAD FILE** to attach the contract.
8. (Optional) Click **ADD REMINDER** if you want to setup a reminder prior to contract expiration.
9. Click **SAVE**.

Accounting Module

The Building Engines Accounting module allows you to efficiently manage billable and non-billable charges related to building operations. With the optional accounting batch file integration, users can control the export process and the flow of data for their specific environment by documenting labor, material, and the taxable charges associated to work orders.

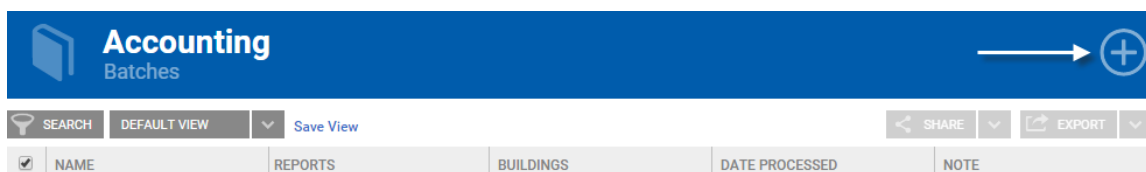
Creating a New Batch File

A batch file is an aggregation of billable work orders and/or preventive maintenance tasks over a pre-determined timeframe. *Note: If you require a customized batch file contact your Client Account Manager for more information. Customized batch files are not part of the core Building Engines product.*

This section describes the process of creating a new batch file.

To create a new batch file:

1. Click **Admin** → **Accounting** → **Batches**.
2. Click the **Create New Batch** icon (+).



3. Provide a **NAME** for the batch, select a **DATE RANGE**, the included **PROPERTIES**, and identify any specific tenants or work orders to be included. **ATTENTION:** *Only work orders and preventive maintenance tasks that have items marked as **billable**, and in the **closed** status, are included on the batch file.*
4. Click **Save** to complete the batch.

Accessing and Exporting Processed Batches

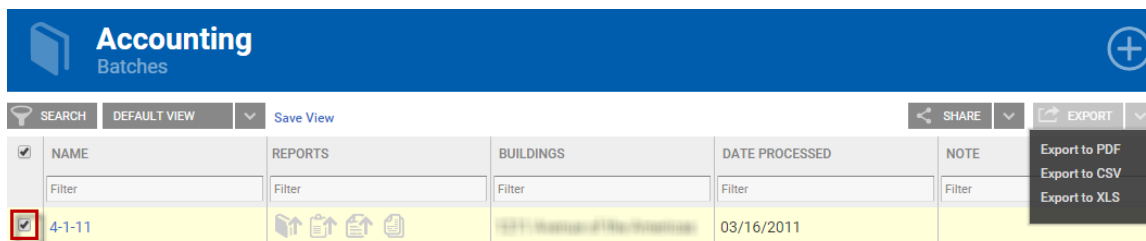
This section describes how to access a processed batch and export into a desired format.

To access a processed batch:

1. Click **Admin** → **Accounting** → **Batches**.
2. Use the **SEARCH** and/or column filters to locate the intended batch file.
3. Click the **NAME**.

To export a batch file:

1. After locating a batch file, click the check box located to the left of the **NAME** field.
2. Click **EXPORT** and select a format.



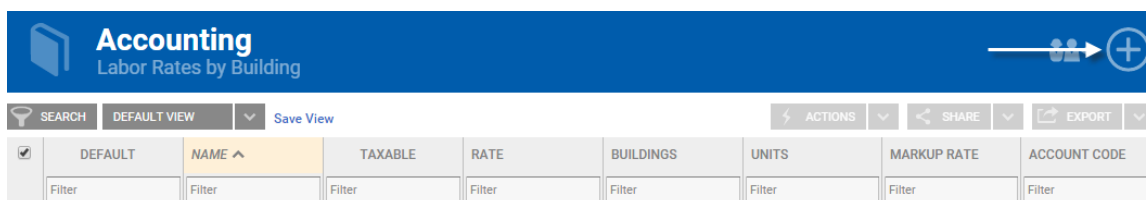
Creating a New Labor Rate

Billable and non-billable labor rates can be created in the Accounting module. Created labor rates can then be applied to work orders and preventive maintenance tasks.

This section describes the process of creating a new labor rate.

To create a new labor rate:

1. Click **Admin** → **Accounting** → **Labor**.
2. Click the **Create New Labor Rate** icon (+).



3. Provide a labor rate **NAME**, **RATE**, and **BUILDING** association. *Note: If a default tax has been created it is applied automatically.*
4. Click **SAVE** to create the labor rate, or **SAVE AND ADD ANOTHER** to create additional labor rates.

Viewing and Editing Labor Rates

This section describes the process of viewing and editing an existing labor rate.

To view a labor rate:

1. Click **Admin** → **Accounting** → **Labor**.
2. Use the **SEARCH** button and/or column filters to locate the desired labor rate.

Accounting Labor Rates by Building								
SEARCH		DEFAULT VIEW	Save View		ACTIONS	SHARE	EXPORT	
DEFAULT	NAME ^	TAXABLE	RATE	BUILDINGS	UNITS	MARKUP RATE	ACCOUNT CODE	
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	
<input checked="" type="checkbox"/>	Engineering Rate	<input checked="" type="checkbox"/>	\$75.00	North Plaza,Sout...				
<input checked="" type="checkbox"/>	General labor	<input checked="" type="checkbox"/>	\$50.00	North Plaza,Sout...				

To edit a labor rate:

1. After locating the labor rate, click the labor rate **NAME**.
2. Use the **Add/Edit Labor** box to edit the labor rate, and click **SAVE**.

Save View

ACTIONS

SHARE

EXPORT

NAME ^

Filter

Engineering

General lab

NAME *

Engineering Rate

RATE *

\$ 75.00

UNITS

TAXABLE

☒ Yes ☐ No

MARKUP RATE

None

☐ Default

PROPERTY(S) *

2 Item(s) Selected

Select All

Type to filter

North Plaza

South Plaza

Washington Avenue

ACCOUNT CODE

Please select a Building or contact support to setup.

SAVE

CANCEL

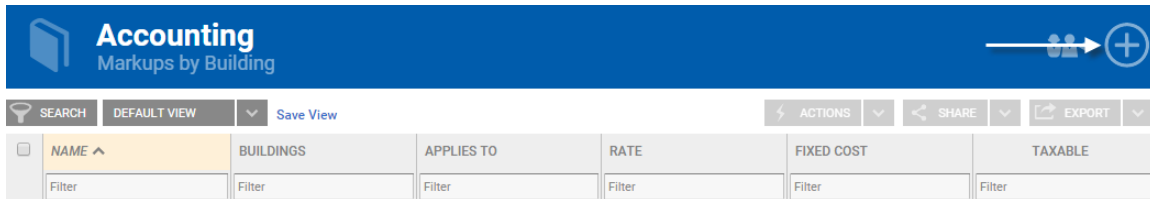
Creating a New Accounting Markup

Markups are used to attach a fixed, or percentage based, fee to labor rates and/or materials. Markups can then be applied to work orders and preventive maintenance tasks.

This section describes the process of creating a new markup.

To create a markup:

1. Click **Admin** → **Accounting** → **Markup**.
2. Click the **Add Markup** icon.



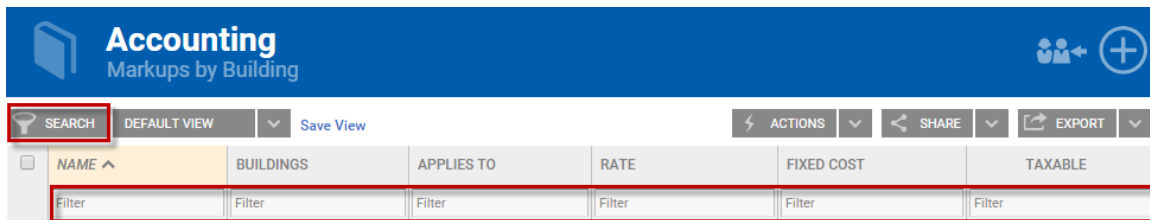
3. Provide a **NAME**, **MARKUP** amount and **BUILDING** association.
4. Select what the markup will apply to: labor, materials, or both. *Note: If a default tax has been created it is applied automatically.*
5. Click **SAVE** to create the markup, or **SAVE AND ADD ANOTHER** to create additional markups.

Viewing and Editing Markups

This section describes the process of viewing and editing markups.

To view a markup:

1. Click **Admin** → **Accounting** → **Labor**.
2. Use the **SEARCH** button and/or column filters to locate the desired markup.



To edit a markup:

1. Click the markup name from the **NAME** column.

SEARCH	DEFAULT VIEW	Save View	ACTIONS	SHARE	EXPORT
NAME ^	BUILDINGS	APPLIES TO	RATE	FIXED COST	TAXABLE
Filter	Filter	Filter	Filter	Filter	Filter
Basic Markup	North Plaza,South Pl...	Materials	10.00%		✓

2. Edit the markup details and click **SAVE**.

Creating a New Material

Billable and non-billable materials can be created in the Accounting module. Created materials can then be applied to work orders and preventive maintenance tasks.

This section describes the process of creating a new material.

To create a new material:

1. Click **Admin** → **Accounting** → **Materials**.
2. Click the **Add Material** icon (+).

Accounting

Materials by Building

SEARCH

DEFAULT VIEW

Save View

ACTIONS

SHARE

EXPORT

<input type="checkbox"/>	NAME ^	CATEGORY	BUILDINGS	COST	TAXABLE	MARKUP R...	ACCOUNT ...	MANUFAC...	PART #	UNITS	VENDOR	INVE
	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter

3. Provide a **NAME**, unit **PRICE**, **CATEGORY**, and **BUILDING** association.
Note: If a default tax has been created it is applied automatically.
4. Click **SAVE** to create the material, or **SAVE AND ADD ANOTHER** to create additional materials.

Viewing and Editing Materials

This section describes the process of viewing and editing existing materials.

To view a material:

1. Click **Admin** → **Accounting** → **Materials**.

2. Use the **SEARCH** button and/or column filters to locate the desired material.

Accounting Materials by Building											
SEARCH	DEFAULT VIEW	Save View	ACTIONS	SHARE	EXPORT						
NAME ^	CATEGORY	BUILDINGS	COST	TAXABLE	MARKUP R...	ACCOUNT ...	MANUFAC...	PART #	UNITS	VENDOR	INVE
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter

To edit a material:

1. Click the material **NAME**.

SEARCH	DEFAULT VIEW	Save View	ACTIONS	SHARE	EXPORT						
NAME ^	CATEGORY	BUILDINGS	COST	TAXABLE	MARKUP R...	ACCOUNT ...	MANUFAC...	PART #	UNITS	VENDOR	INVE
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
100w Lig...	Electrical	North Pl...	\$20.00	✓	Basic Ma...						
Access ...	Safety	North Pl...	\$5.00	✓							

2. Edit the markup details and click **SAVE**.

To delete a material:

Click the check box located to the left of the material, click **ACTIONS**, and select **Delete**.

SEARCH	DEFAULT VIEW	Save View	ACTIONS	SHARE	EXPORT						
NAME ^	CATEGORY	BUILDINGS	COST	TAXABLE	MARKUP R...	ACCOUNT ...	MANUFAC...	PART #	UNITS	VENDOR	INVE
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input checked="" type="checkbox"/> 100w Lig...	Electrical	North Pl...	\$20.00	✓	Basic Ma...						
<input type="checkbox"/> Access ...	Safety	North Pl...	\$5.00	✓							

Creating a New Tax Rate

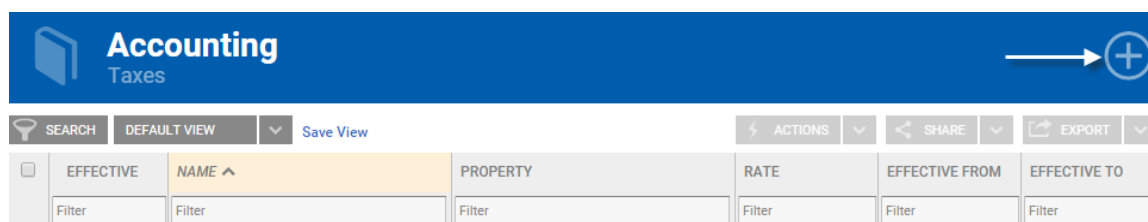
Tax rates can be created in the Accounting module. Created tax rates can then be applied to work orders and preventive maintenance tasks.

This section describes the process of creating a new tax rate.

To create a new tax rate:

1. Click **Admin** → **Accounting** → **Taxes**.

- Click the **Add Tax Rate** icon (+).



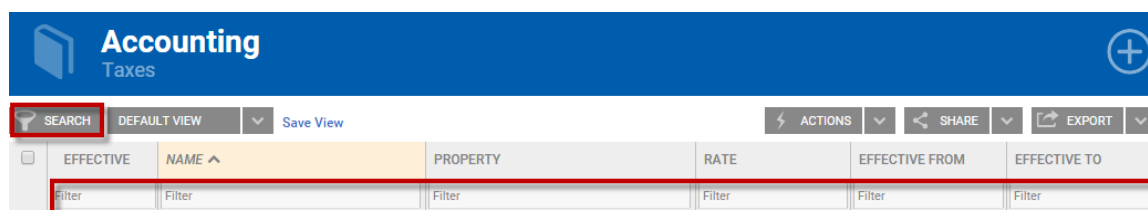
- Provide a tax **NAME**, **RATE**, and **BUILDING** association.
- Click **SAVE** to create the tax rate, or **SAVE AND ADD ANOTHER** to create additional tax rates.

Viewing and Editing Tax Rates

This section describes how to view and edit tax rates.

To view a tax rate:

- Click **Admin** → **Accounting** → **Taxes**.
- Use the **SEARCH** button and/or column filters to locate the desired tax rate.

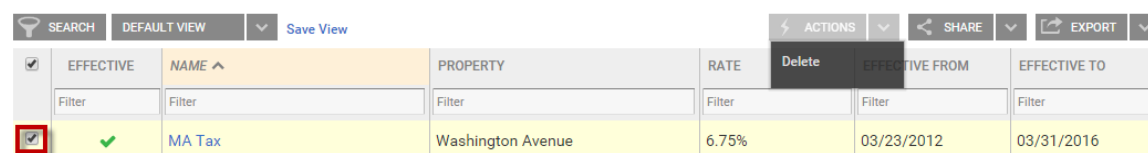


To edit a tax rate:

- Click the tax rate name from the **NAME** column.
- Edit the tax details and click **SAVE**.

To delete a tax rate:

- Click the check box located to the left of the tax rate.
- Click **ACTIONS**, and select **Delete**.



Purchase Orders

Purchase Order (PO) tracking provides a workflow for managing approved expenditures for work requests. Integrating the inventory component of Purchase Order allows you to manage inventory, and be notified when stock gets low. The Purchase Order dashboard provides a centralized location for managing the Purchase Orders you have approved for payment.

This section describes the process of PO setup, incorporating and managing PO inventory, and how to create, edit, and close out PO's.

Purchase Order Setup and Functionality

The Purchase Order feature can be setup with three different configurations. *Note: These configurations are initially set up by your Client Account Manager based on the specific requirements of your property management organization. The configuration cannot be changed by a System Administrator in the Building Engines system.*

1. **Standard** – Purchase orders cannot be linked directly to work order numbers.
 - a. Within the Standard setting, all purchase order functionality is managed via the Purchase Order panel under **Admin → Accounting Purchase Orders**.
2. **Linked** – Purchase orders can be linked directly to work order numbers.
 - a. Within the Linked setting, purchase order functionality is managed through **Admin → Accounting → Purchase Orders** and also in the **Purchase Orders** section of the specific work order.
3. **Enforced** – Purchase orders can be linked directly to work order numbers, and work orders cannot be closed with an open purchase order attached.
 - a. Within the Enforced setting, purchase order functionality is managed through **Admin → Accounting → Purchase Orders** and also in the **Purchase Orders** section of the specific work order.

Purchase Orders with Inventory Management

Enabling Purchase Order with Inventory management allows you to include Materials from your library into your Purchase Orders. As Materials are included on a PO, the inventory count is decremented to show the remaining stock of that material. When stock gets low, alerts can be configured to notify you and your staff to re-order inventory. *Note: This is NOT a default setup of the Purchase Order Module. To enable this feature, reach out to your Client Account Manager.*

Setting up a Low Inventory Notification

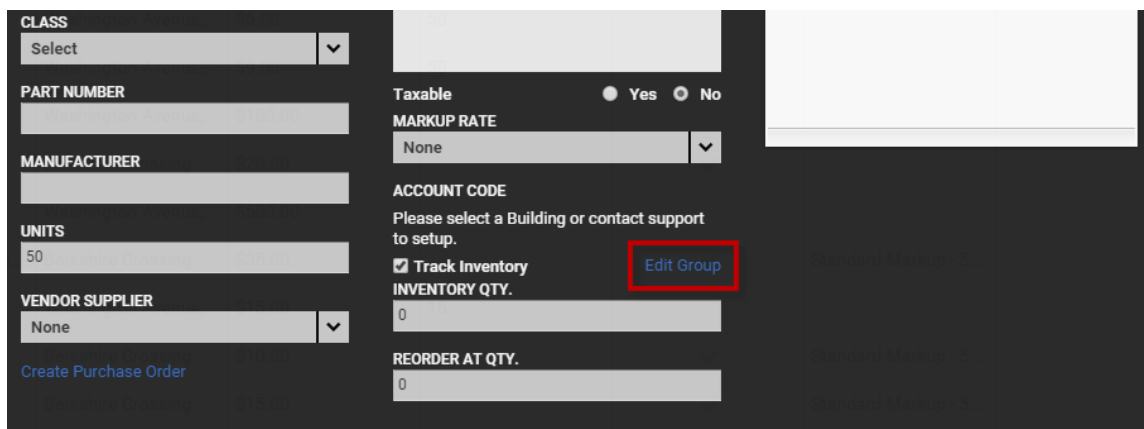
When Purchase Order inventory drops to a specific quantity you can configure the system to send out an alert to a designated employee or group of employees. This section describes how to define a notification threshold and set up the notification.

To define the threshold at which a material needs reordered:

1. Click **Admin → Accounting → Materials**.
2. Use the **SEARCH** and/or column filters to locate the material you want to track inventory for. *Note: If the material does not exist, refer to the section called Creating a New Material.*
3. Click the material **NAME**.
4. Click **Track Inventory**.
5. Enter the current total material inventory in the **INVENTORY QTY** field.
6. Enter the reorder threshold in the **REORDER AT QTY** field.

To define the recipients of the low inventory notification:

1. Click **Edit Group**.

A screenshot of a web application form titled 'Edit Group'. The form is divided into two main columns. The left column contains several input fields: 'CLASS' with a dropdown menu showing 'Select', 'PART NUMBER' with a text input, 'MANUFACTURER' with a text input, 'UNITS' with a text input showing '50', and 'VENDOR SUPPLIER' with a dropdown menu showing 'None'. Below these fields is a blue link that says 'Create Purchase Order'. The right column contains several settings: 'Taxable' with radio buttons for 'Yes' and 'No', 'MARKUP RATE' with a dropdown menu showing 'None', 'ACCOUNT CODE' with a text input and a note 'Please select a Building or contact support to setup.', a checked checkbox for 'Track Inventory', 'INVENTORY QTY.' with a text input showing '0', and 'REORDER AT QTY.' with a text input showing '0'. A red rectangular box highlights the 'Edit Group' link in the right column.

2. Select the employees to be notified, and click **Close**.
3. Click **SAVE** to finish.

Adding Inventory to a Purchase Order

Inventory from the Accounting library can be added to a Purchase Order. This section describes the process of adding a tracked material to a Purchase Order.

To create a purchase order, using a material from your Accounting library:

1. Navigate to the **Purchase Order** section of a work order, and click **(+)**.



2. Use the dropdown to enter the **REQUESTED BY** and **VENDOR** being used to order materials from.
3. Navigate to the Materials section and click the **(+)** icon.
4. Select a **Material Category**.
5. Select a **Material**.

 A screenshot of the 'Materials' section in the software. It features a table with four columns: 'MATERIAL', 'QUANTITY', 'UNIT COST', and 'TAXABLE'. The 'MATERIAL' column has two dropdown menus labeled 'Select Category' and 'Select Material'. The 'UNIT COST' column shows a value of '\$ 9.00'. The 'TAXABLE' column has a checkbox. There are close and add (+) buttons in the top right corner of the section.

6. Enter the **QUANTITY**.
7. (Optional) Check the **TAXABLE** box if it's taxable.
8. Click **SAVE** to enter in the purchase order, or **SAVE AND ADD ANOTHER** to create another purchase order.


Adding an Untracked Material to a Purchase Order

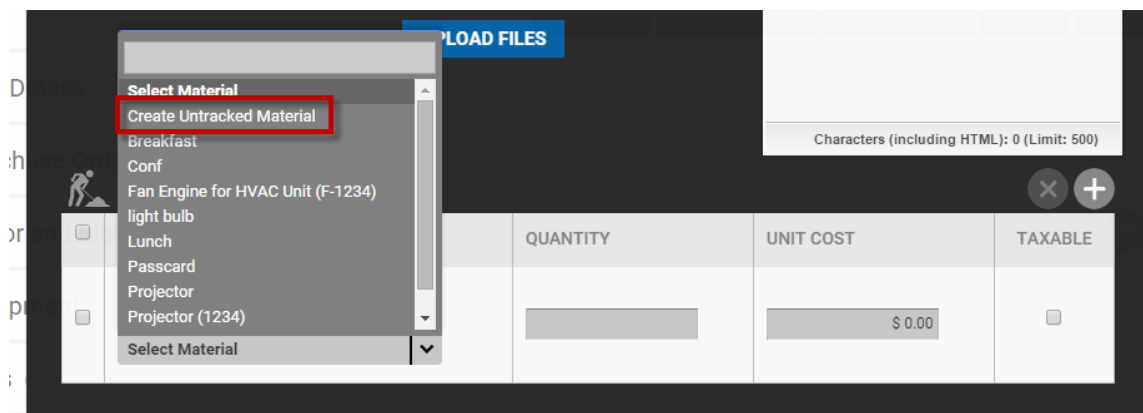
A material that is not in your Accounting library, an untracked material, can be added to a purchase order. This section describes the process of adding an untracked material to a Purchase Order.

To create a purchase order using an untracked material:

1. Navigate to the **Purchase Order** section of a work order and click **(+)**.



2. Use the dropdown to enter the **REQUESTED BY** and **VENDOR** being used to order materials from.
3. Navigate to the Materials section and click the  icon.
4. Using the **Select Material** field, select **Create Untracked Material**.



5. Enter the **MATERIAL** name, **UNIT COST**, and any other information you have about the material.
6. Click **SAVE**.
7. Enter the **QUANTITY**.
8. Click **SAVE** to enter in the purchase order, or **SAVE AND ADD ANOTHER** to create another purchase order.

Creating a Purchase Order

This sections describes the process of creating a purchase order from within the work order and from the Accounting module.

To create a purchase order from within the work order:

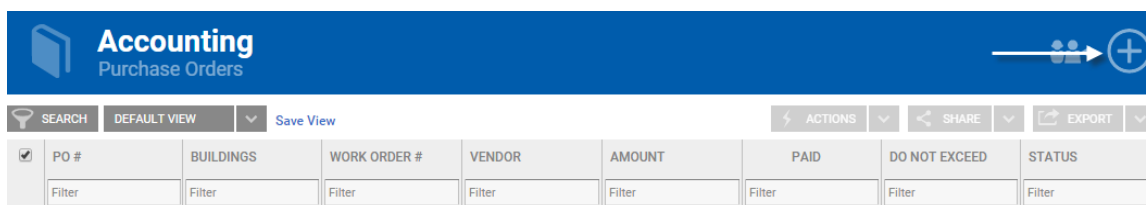
1. Navigate to the Purchase Order section of a work order and click **(+)**.



2. Enter the purchase order details into the **Add PO** box.
3. Click **SAVE** to enter in the purchase order, or **SAVE AND ADD ANOTHER** to create another purchase order.

To create a purchase order from the Accounting module:

1. Click **Admin** → **Accounting** → **Purchase Orders**.
2. Click the **Create New Purchase Order** Icon (+).



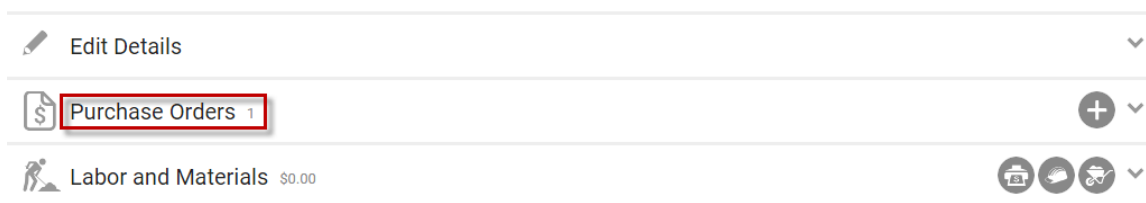
3. Enter the purchase order details into the **Create New Purchase Order** box.
4. Click **SAVE** to enter in the purchase order, or **SAVE AND ADD ANOTHER** to create another purchase order.

Viewing and Editing a Purchase Order

This section describes how to view and edit a purchase order from within the work order and from the Accounting Module.

To view and edit a purchase order from within the work order:

1. Click the **Purchase Orders** section of a work order.



2. Click the **PURCHASE ORDER #**.
3. Click the **Edit Details** section and edit the appropriate fields.
4. Click **SAVE**.

To view or edit the purchase order from the Accounting module:

1. Click **Admin** → **Accounting** → **Purchase Orders**.
2. Use the **SEARCH** and/or column filters to locate the intended Purchase Order.

3. Click the **PO#**.

Accounting Purchase Orders							
SEARCH	DEFAULT VIEW	Save View	ACTIONS	SHARE	EXPORT		
PO #	BUILDINGS	WORK ORDER #	VENDOR	AMOUNT	PAID	DO NOT EXCEED	STATUS
Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input checked="" type="checkbox"/> 502	North Plaza	151483579	Eli's Electrical Ser...	\$0.00	✓	\$100.00	Closed

4. Click the **Edit Details** section and make the appropriate edits.

5. Once finished, click **SAVE**.

Managing Received Purchase Order Material

If a material on a Purchase Order doesn't arrive all at once you, can track the quantity received each time more material is delivered. This section describes the process of adding received material to a Purchase Order.

To mark materials as being received on a purchase order:

1. Locate and enter the appropriate purchase order.
2. Navigate and click on the **Materials** section.
3. Check the box to the left of the material received, and click the **Add Quantity Recived** icon.

Edit Details								
Materials \$75.00								
<input checked="" type="checkbox"/>	MATERIAL	QUANTITY	UNIT COST	TAXABLE	RECEIVED	PART NUMBER	ACCT CODE	TOTAL
<input checked="" type="checkbox"/>	4 in bolts	50	\$1.50					\$75.00
Files 0								

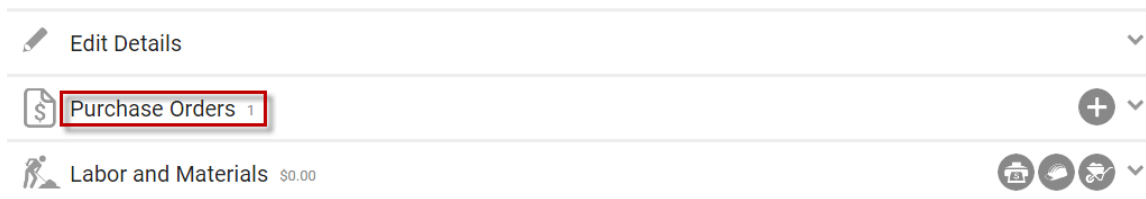
4. Enter the **QUANTITY RECEIVED**, and click **SAVE**.

Closing a Purchase Order

After you have sent payment for an invoice associated to a purchase order you can mark the purchase order as paid and close it out. This section describes the process of marking a purchase order as paid, and then closing it out, from within the work order and from the Accounting Module.

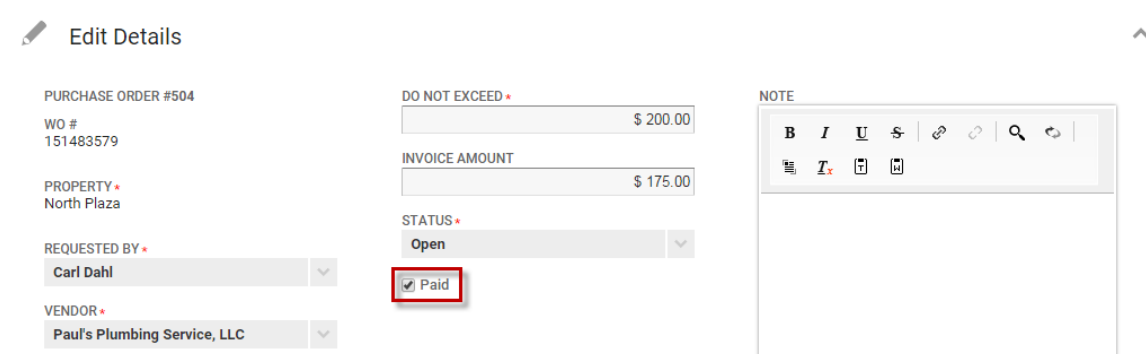
To mark the purchase order as paid and close it from the within the work order:

1. Click the **Purchase Orders** section of the work order.



The screenshot shows the top section of a work order interface. It includes a header with 'Edit Details' and a dropdown arrow. Below this is a section titled 'Purchase Orders' with a red box around it, indicating it's the target for the next step. To the right of this section is a plus icon and a dropdown arrow. Below the 'Purchase Orders' section is another section titled 'Labor and Materials' with a value of '\$0.00' and three icons (a building, a hand, and a truck) with a dropdown arrow.

2. Click the **PURCHASE ORDER #**.
3. Click the **Edit Details** section and edit the appropriate fields.
4. Click the **Paid** box.



The screenshot shows the 'Edit Details' section of a purchase order. It contains several fields: 'PURCHASE ORDER #504', 'WO # 151483579', 'PROPERTY North Plaza', 'REQUESTED BY Carl Dahl', 'VENDOR Paul's Plumbing Service, LLC', 'DO NOT EXCEED \$200.00', 'INVOICE AMOUNT \$175.00', 'STATUS Open', and a 'Paid' checkbox which is highlighted with a red box. There is also a 'NOTE' section on the right with a text area and a toolbar.

5. (Optional) Enter the **INVOICE AMOUNT**.
6. Change the status of the purchase order to **Closed**, and click **SAVE**.

To mark the purchase order as paid and close it out from the Accounting Module:

1. Click **Admin** → **Accounting** → **Purchase Orders**.
2. Use the **SEARCH** and/or column filters to locate the intended Purchase Order.
3. Click the **PO #**.
4. Click the **Edit Details** section.

5. Check the **Paid** box, to indicate the purchase order was paid.

Edit Details

PURCHASE ORDER #504
WO # 151483579
PROPERTY North Plaza
REQUESTED BY Carl Dahl
VENDOR Paul's Plumbing Service, LLC

DO NOT EXCEED \$200.00
INVOICE AMOUNT \$175.00
STATUS Open
☒ Paid

NOTE

6. (Optional) Enter the **INVOICE AMOUNT**.
7. Change the **STATUS** of the purchase order to **Closed**, and click **SAVE**.

Task Calendar

The Task Calendar is an aggregated list of all open and scheduled Work Orders, PM tasks, and Inspections. Users can sort tasks by their name, property, assignee, and task type.

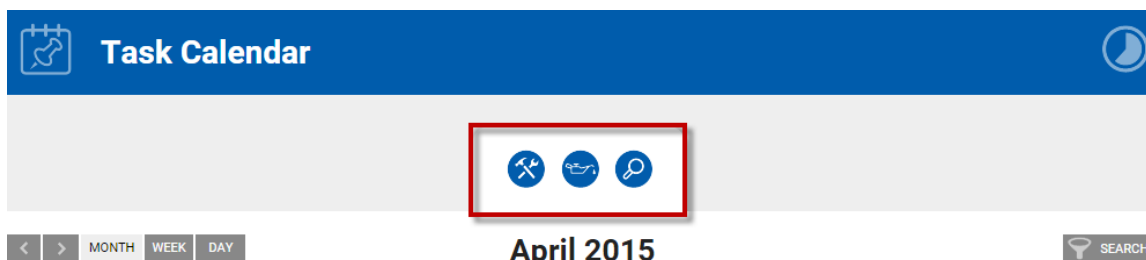
This section describes how sort tasks by your name, by building, assignee, date range, and type.

Viewing My Tasks

This section describes the process of viewing tasks that are assigned to you via the Task Calendar.

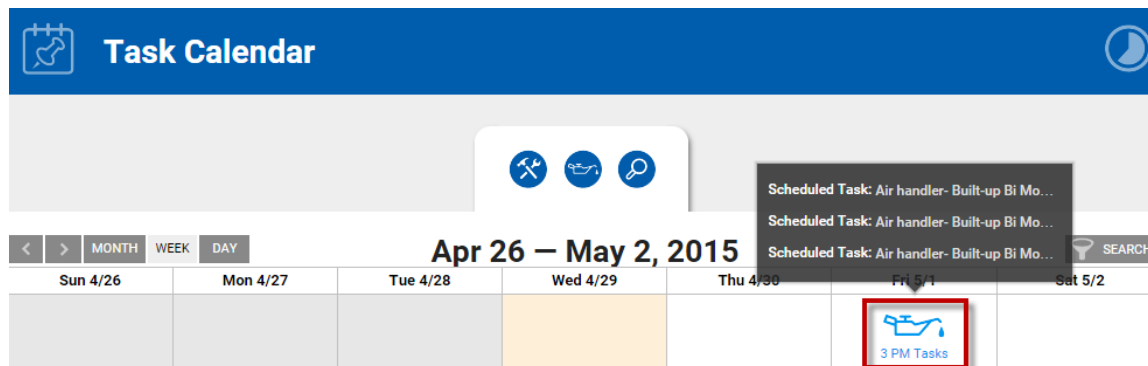
To access your assigned tasks via the task calendar:

1. Click **Go To → Task Calendar → My Tasks**.
2. (Optional) To sort by task type, click an icon to remove that particular task type from the calendar grid. The default view displays all the task types.

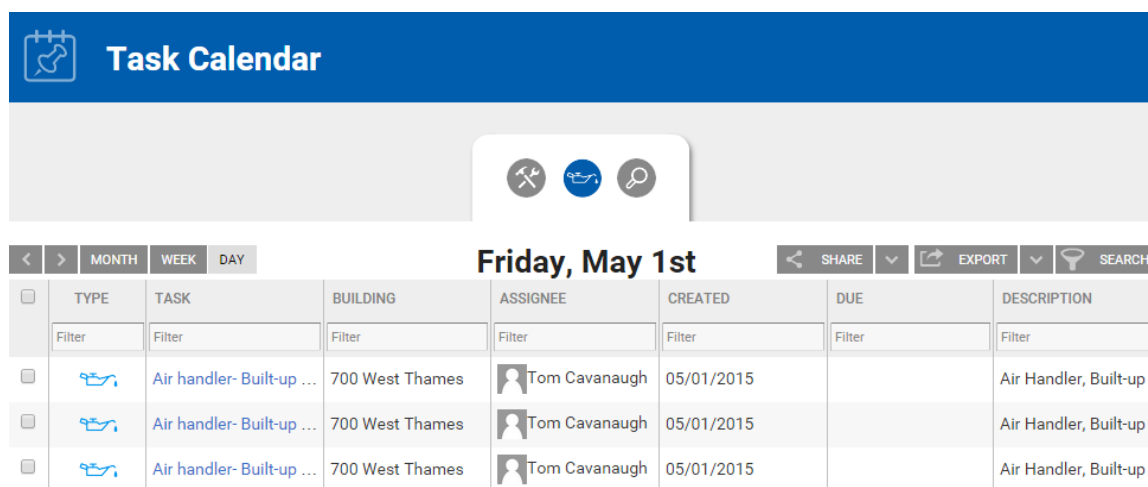


3. (Optional) To sort by assignee, building, or type, click **SEARCH** and use the provided fields to fine tune the calendar.

- (Optional) Click **WEEK** or **DAY** to give yourself a more granular look at the specific tasks assigned to you.
- (Optional) While in the **WEEK** view, hover over the task icon and a bubble appears giving you the ability to access a specific task.



- (Optional) Click **DAY** or the task icon to see the associated tasks in the grid view.

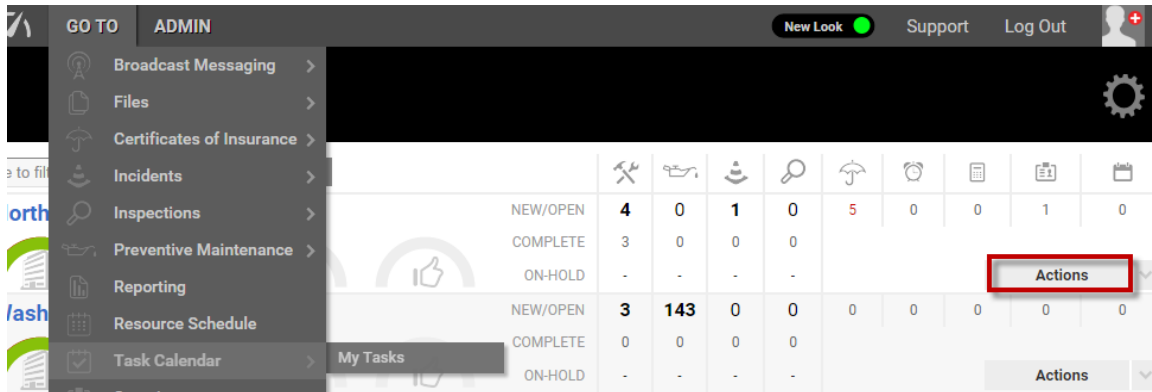


Viewing Tasks by Building

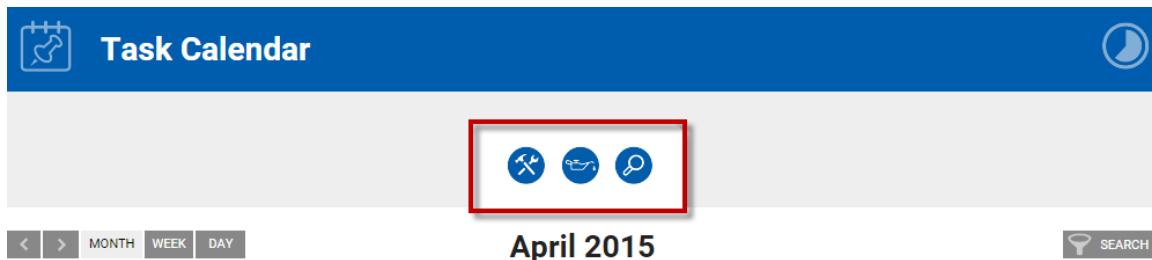
This section reviews the process of viewing tasks associated to a single building, or all buildings via the Task Calendar.

To view the tasks at a single building:

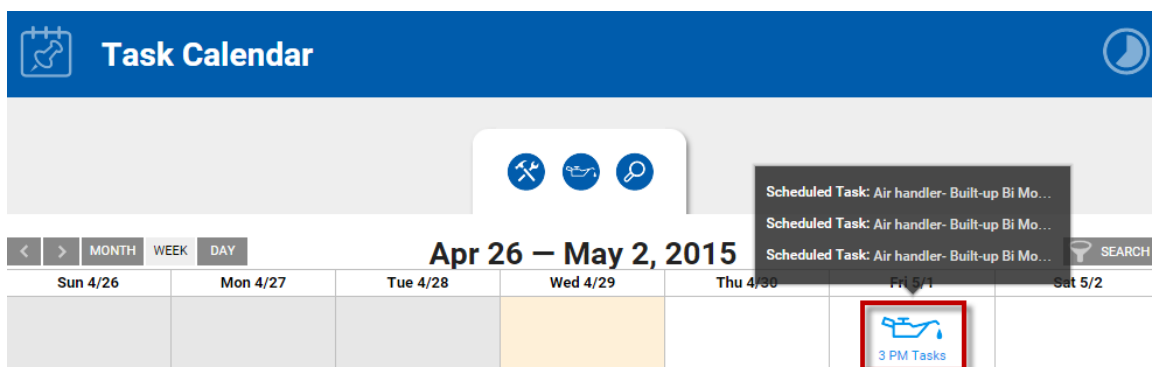
1. Click **Go To → Task Calendar**, or select **Task Calendar** from the **Actions** dropdown.



2. Click **SEARCH**, select a **BUILDING** and click **SEARCH**.
3. (Optional) To sort by task type, click an icon to remove that particular task type from the calendar grid. The default view displays all the task types.



4. (Optional) To sort by assignee, building, or type, click **SEARCH** and use the provided fields to fine tune the calendar.
5. (Optional) Click **WEEK** or **DAY** to give yourself a more granular look at the tasks associated to the building.
6. (Optional) While in the **WEEK** view, hover over the task icon and a bubble appears giving you the ability to access a specific task.



7. (Optional) Click **DAY** or the task icon to see the associated tasks in the grid view.

Task Calendar

Friday, May 1st

	TYPE	TASK	BUILDING	ASSIGNEE	CREATED	DUE	DESCRIPTION
<input type="checkbox"/>	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input type="checkbox"/>		Air handler- Built-up ...	700 West Thames	Tom Cavanaugh	05/01/2015		Air Handler, Built-up
<input type="checkbox"/>		Air handler- Built-up ...	700 West Thames	Tom Cavanaugh	05/01/2015		Air Handler, Built-up
<input type="checkbox"/>		Air handler- Built-up ...	700 West Thames	Tom Cavanaugh	05/01/2015		Air Handler, Built-up

Time Cards

The Time Cards module provides Managers an easy way to track their employee's labor hours. Once configured, employees use the mobile application to track their labor hours, overtime, or additional times such as vacation and sick time. *Note: Time Card must be enabled by your Client Account Manager before using.*

This section describes how to designate managers, configure employees, enter hours, and run Time Card reporting.

Designating a Time Card Manager

Before the Time Cards module can be utilized, a Time Card Manager(s) must be designated to approve employee hours. *Note: Designating a Time Card Manager can only be done through a system admin account.* This section describes the process of designating a Time Card Manager from the **desktop version**.

To designate a Time Card Manager:

1. Click **Admin → Employees**.
2. Use the **SEARCH** and/or column filters to locate the intended employee.
3. Click the employee's **NAME**.

4. Navigate to the bottom of their user record and click **User can approve Time Cards.**

The screenshot shows a user record form with fields for PHONE, PHONE EXT., ADDRESS, and CITY/STATE/ZIP. To the right is a 'NOTES' section with a rich text editor. On the far right, the 'FLS GROUPS' dropdown is set to '1 selected'. Below it, the 'TIME CARDS' section is highlighted with a red box, containing two checkboxes: 'User can approve Time Cards' (checked) and 'User can submit Time Cards' (unchecked).

5. Click **SAVE.**

Configuring Time Card for an Employee

Employee Time Cards must be enabled from the desktop application before it displays on your employee's mobile application. *Note: Configuring Time Card for an employee must be done through a system admin account.* This section describes the process of enabling the Time Card from the **desktop version**.

To enable the Time Card for an employee:

1. Click **Admin → Employees.**
2. Use the **SEARCH** and/or column filters to locate the intended employee.
3. Click the employee's **NAME.**
4. Navigate to the bottom of their user record and click **User can submit Time Cards.**

The screenshot shows the same user record form as before, but with the 'TIME CARDS' section highlighted by a red box. In this view, 'User can approve Time Cards' is unchecked, 'User can submit Time Cards' is checked, and 'User can submit Overtime' is unchecked. Below these checkboxes is a 'MANAGER' field with a red asterisk and a 'Select' dropdown menu.

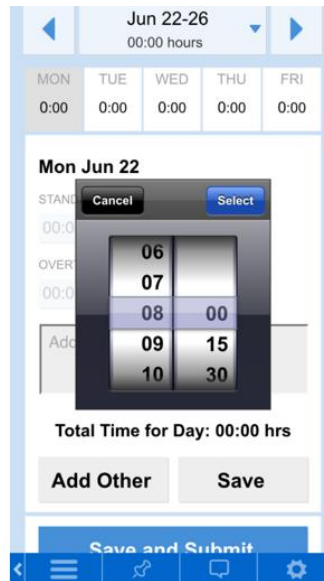
5. Select a **MANAGER.** *Note: Only users authorized as being able to approve a time card are displayed as an option in the **MANAGER** field.*
6. Click **SAVE.**

Entering Time on a Time Card

This section describes the process of entering time on your time card using the **mobile application**. **WARNING:** *You must log hours for each day of the week that you work. Failure to log and save your hours daily will result in a loss of hours for that particular day.*

To enter time:

1. From the Home Screen of the mobile application, click **Time Cards**.
2. Select the week you want to enter time for. *Note: To enter time for another week, click the date dropdown or the left/right arrow located next to the week range.*
3. Click the day of the week you want to add time to.
4. Click the **STANDARD TIME** field.
5. Use the scroll wheel to select the hours and minutes, and click **Select**.



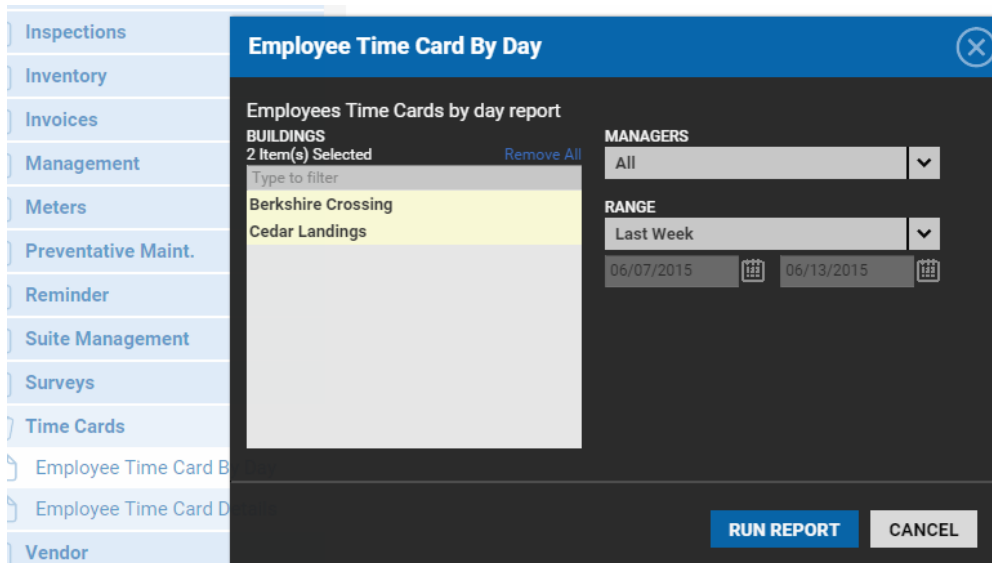
6. (Optional) To add Overtime, click the **OVERTIME** field, and enter your time using step 5 above. *Note: A comment may be required when Overtime is entered.*
7. (Optional) Some accounts may elect to track additional types of time such as vacation or sick time. To enter time other than Standard or Overtime:
 - a. Click **Add Other**.
 - b. Select the **TYPE** of time you want to add.
 - c. Click the **TIME** field.
 - d. Use the scroll wheel to select your hours and minutes, and click **Select**.
8. Click **Save** to enter your time.
9. (Optional) Repeat Steps 3-8 for the rest of the days of the week.

Reporting on the Time Card

This section describes how to run, export, save, and schedule Time Card specific reporting from the **desktop version** of the application.

To run a Time Card report:

1. Click **Go To → Reporting**.
2. Navigate and click on the **Time Cards** category.
3. Select a report.
4. Select a **BUILDING(S)**.



The screenshot shows a software interface for generating a report. On the left is a vertical sidebar with a list of categories: Inspections, Inventory, Invoices, Management, Meters, Preventative Maint., Reminder, Suite Management, Surveys, Time Cards, Employee Time Card B, Employee Time Card D, and Vendor. The 'Time Cards' category is expanded, showing sub-items: 'Employee Time Card B' and 'Employee Time Card D'. The main window is titled 'Employee Time Card By Day' and contains the following fields:

- Employees Time Cards by day report**: The main title of the report.
- BUILDINGS**: A section with '2 Item(s) Selected' and a 'Remove All' link. Below it is a search bar 'Type to filter' and a list of selected buildings: 'Berkshire Crossing' and 'Cedar Landings'.
- MANAGERS**: A dropdown menu currently set to 'All'.
- RANGE**: A dropdown menu currently set to 'Last Week'.
- Date Range**: Two calendar icons showing the dates '06/07/2015' and '06/13/2015'.
- Buttons**: 'RUN REPORT' (in blue) and 'CANCEL' (in grey) at the bottom right.

5. (Optional) To run the report on a single Manager, select a Manager from the **MANAGER** field.
6. Use the calendars and/or dropdown to select a date **RANGE**.
7. Click **RUN REPORT**.

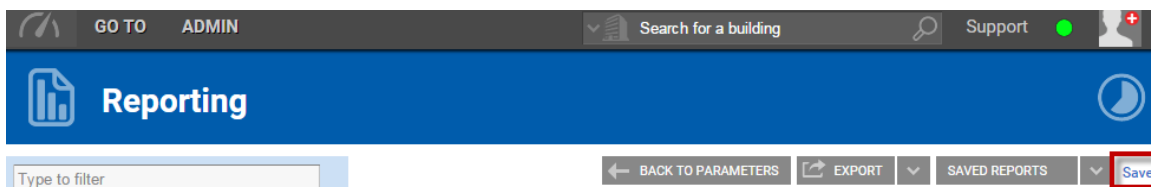
To export the report:

1. Run a Time Card report.
2. Click **EXPORT** and select a format.

To save and schedule a Time Card report:

1. Run a Time Card report.

2. Click **Save**.



3. Enter a report **NAME** and **DESCRIPTION**.
4. (Optional) To Schedule:
 - a. Click **Schedule report**.
 - b. Use the calendar icon to select a **START DATE**.
 - c. Select a frequency using the **HOW OFTEN** field.
 - d. Select a **DELIVERY METHOD** and **DELIVERY FORMAT**.
5. Click **SAVE**.

Out of Office

The Out Of Office (OOO) feature allows you to re-route new work order assignments and notifications to a designated back up employee for a specified date range. This includes auto-assigned work orders, scheduled work orders, recurring work orders, work order notifications, and Performance Management escalations. *Note: This feature does not affect Inspections, Preventive Maintenance tasks, non-work order notifications, or existing assignments in any status other than New.*

Configuring Out of Office

This sections describes the process of configuring an Out of Office for a specified date range.

To configure an Out of Office:

1. Click **Admin → Employees**.
2. Use the **SEARCH** and column filters to locate the employee you want to configure an Out of Office for.
3. Click the **NAME**.
4. Once in the Employee record, scroll down and click **CONFIGURE OUT OF OFFICE**.



5. Check the **Turn On Out of Office** box.

6. Select a **START DATE**, **END DATE**, and a **BACKUP**, and click **SAVE**.

Building Connect

Building Connect allows you to easily create and manage a public facing website. Leveraging one of our three pre-designed templates, you can create an individual website for each of your buildings or you can connect a portfolio of buildings to one generic site. The integrated tenant login allows you to publically show off your property's amenities while simultaneously keeping sensitive information to current tenants.

This section describes how to create and manage a Building Connect website. *Note: Your Client Account Manager must configure Building Connect before a website can be created.*

Getting Started - Entering Site Details

After your Client Account Manager provisions your URL and gives you access to Building Connect you can begin creating your website. This section describes the process of entering the website details.

To enter your website details:

1. Click **Admin → Building Settings → Building Connect**.
2. Click the **Site Name** you want to begin creating or edit.
3. Using the **1) Get Started** tab, confirm your **Site Name** and **Web Site Address**.

4. (Optional) Enter the public facing **Phone Number**, **Email Address**, and social media links.

5. By default, your **Company Logo** and **Building Picture** are displayed as they are on the tenant interface. To edit either image, click the corresponding **ADD PHOTO** to edit.

6. (Optional) To update the Site Logo, click **Upload New Site Logo**.
7. Click **Continue** to save your work and progress to the **Design It** tab.

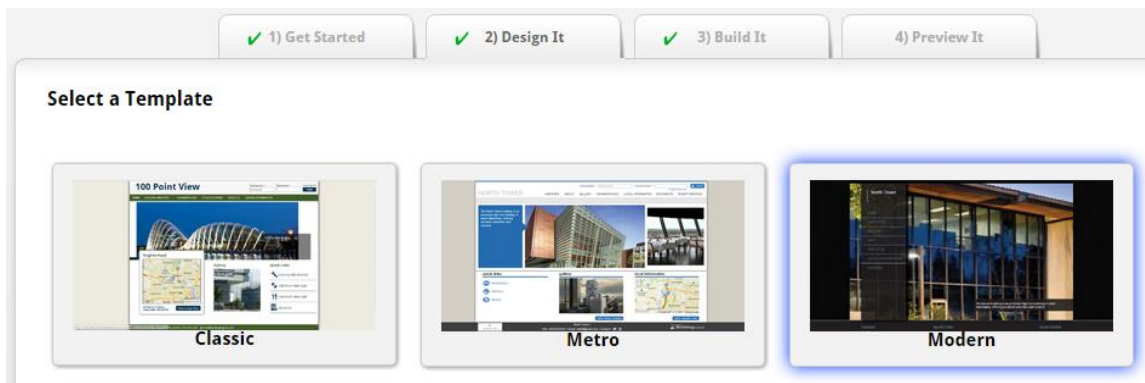
Selecting a Template and Theme

After you have entered your website details you need to select a template, theme, and homepage images. A theme can be selected from one of the five pre-designed styles or customized using the color, font, and background options. Depending upon the template selected, you are required to provide two or three homepage or banner images to progress to the next phase of setup.

This section describes the process of selecting a template, theme, and uploading your homepage/banner images.

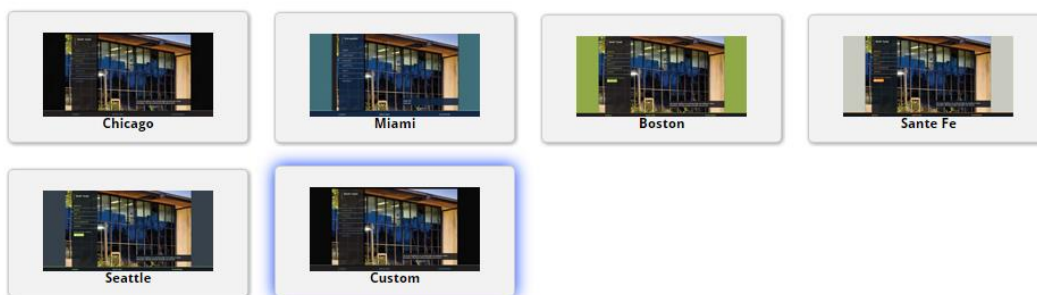
To select a Building Connect template:

1. Click **Admin → Building Settings → Building Connect**.
2. Click the **Site Name** you want to select a template for or edit.
3. Click the **2) Design It** tab.
4. Click on the template you want to use.



5. Click on the theme you want to use. To create a custom theme, click the **Custom** option and select your **Primary Color**, **Secondary Color**, **Header & Footer Style**, and **Background** color.

Select a Theme



Customize your theme

Primary Color:*

990615

Text

Secondary Color:*

B80613

Text

Header & Footer Font Style:*

☒ Light Text


☐ Dark Text

Background:*



- (Optional) Enter a **Site Header** and **Site Description**. *Note: The Classic template does not have a Site Header.*
- Within the **Enter a few additional details** section, click **Select New Image** to upload your **Homepage Image(s)** and/or **Banner/Header Image**.

Enter a few additional details

Site Description Header: <input type="text"/>	Large Homepage Image: *  Select New Image Suggested Dimensions: 1000x750	Banner/Header Image: *  Select New Image Suggested Dimensions: 1000x150
Site Description: <div></div>		
<div>Continue</div>		

- Click **Continue** to save your work and progress to the **Build It** tab.

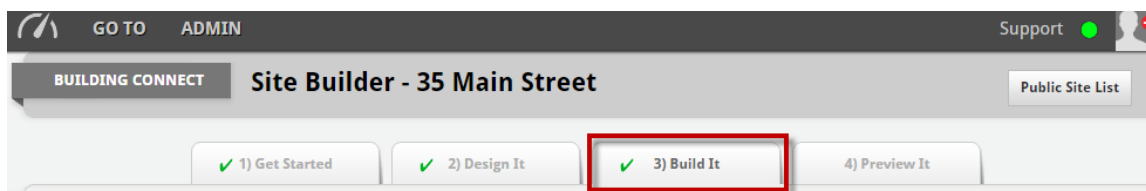
Creating Page and Subpage Content

After you have completed the **Get Started** and **Design It** tabs, you can begin creating the layout and content for your website. Website content is broken down into Pages and Subpages. Pages are displayed on every page, while Subpages are housed within a Page. Subpages can be accessed by expanding the primary Page or by mousing over the Page.

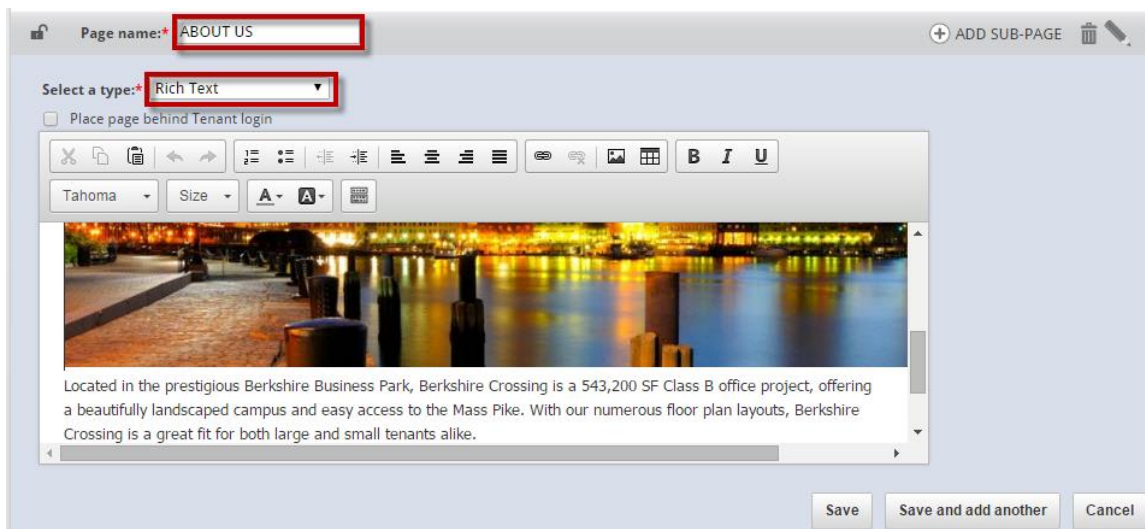
This section describes the process of creating Pages and Subpages, and explains the different layout types available.

To create a Page:

- Click **Admin → Building Settings → Building Connect**.
- Click the **Site Name** you want to create content for.
- Click the **2) Build It** tab.

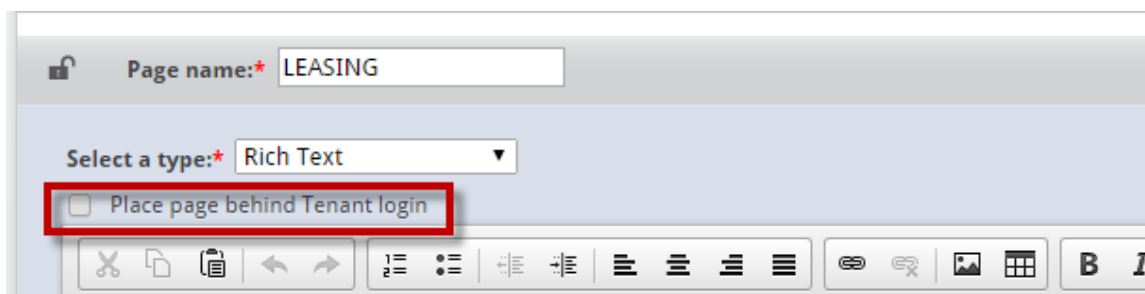


4. Enter a **Page Name**, and click **Select a type** to select the type of webpage content you want for this section.



Page Types:

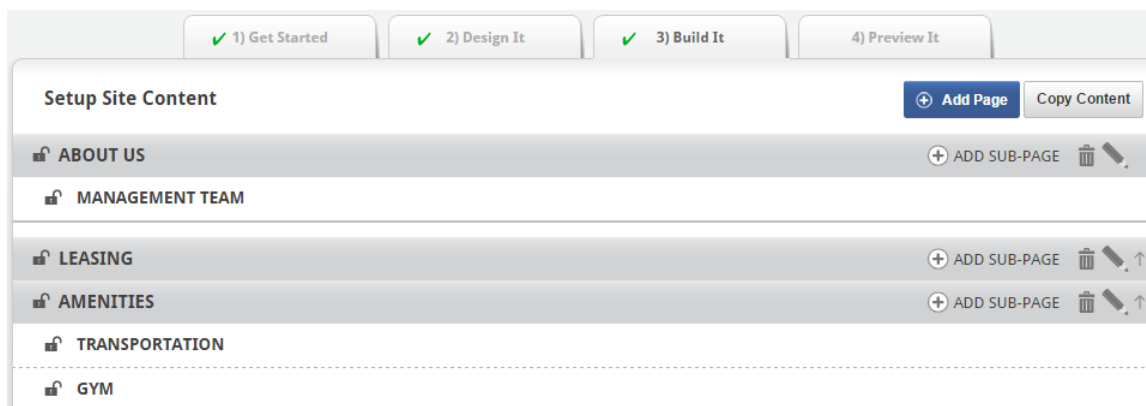
- Rich Text:** Rich Text allows you to enter multiple types of content onto your page or subpage. Examples include text, hyperlinks, images and tables.
 - Map:** Map allows you to imbed a Google map and its standard functionality. For example, you can display where your building is located, directions, nearby amenities, and real-time traffic.
 - Photo:** Photo allows you to create a photo album and descriptive text. Photo albums can be static or dynamic, and include transitional effects.
 - Link:** This option allows you to either imbed another webpage into your webpage or open a new browser when clicked. Imbedding the link into your webpage allows users to remain on your website while browsing content on another website.
5. (Optional) Click **Place page behind Tenant login** if you ONLY want the content visible to tenants who have logged into their portal.



6. Enter your content, and click **Save** or **Save and add another** to start a new Page.

7. (Optional) To create a **Subpage**:

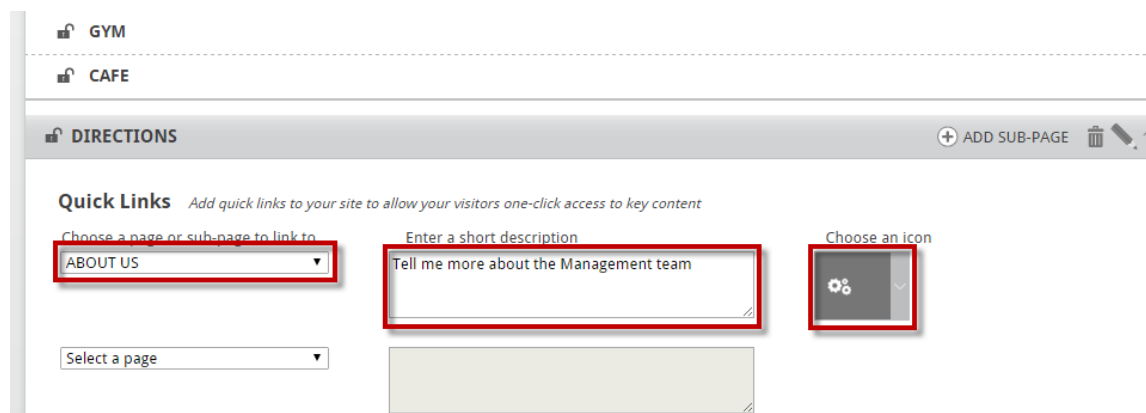
- Click **+ ADD SUB-PAGE** under the Page you want the Subpage content to be housed under.
- Follow steps 4-6. The following screenshot demonstrates an example of the Page/Subpage layout.



8. (Optional) To create additional **Pages**, click **+ Add Page**, and repeat steps 4-6.

9. (Optional) To create a **Quick Link**:

- Select a Page or Subpage that the **Quick Link** links a user to.
- Enter a short description that is displayed when the user mouses over the **Quick Link**.
- Select the Quick Link's icon that is displayed on the Homepage.
- Repeat steps a-c for the rest of the Quick Links.



10. Once you have completed your Pages, Subpages, and optional Quick Links, click **Continue** to preview your unpublished website.

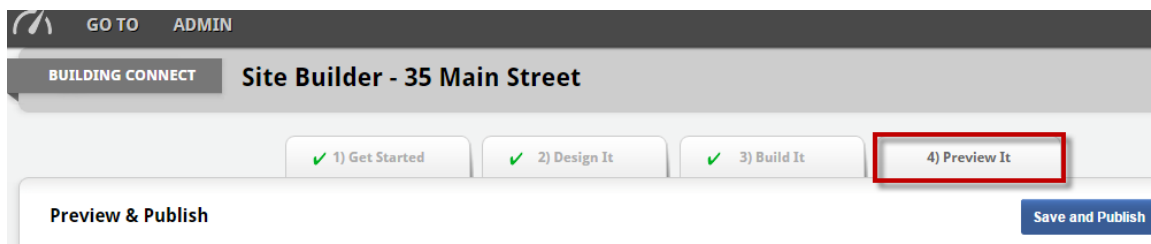
Previewing and Publishing your Website

Once you have finished creating your Building Connect website you can review its look and layout on the Preview It tab. This allows you to view the website as a visitor would and make any necessary edits prior to publishing it the internet. A

This sections describes how to view your Building Connect site before it has been published to the internet.

To preview your Building Connect website:

1. Click **Admin → Building Settings → Building Connect**.
2. Click the **Site Name** you want to preview.
3. Click the **4) Preview It** tab.



4. (Optional) To view the website using the full screen, click **Launch Full Window**.
5. (Optional) If you want to make edits:
 - a. Click the appropriate tab
 - b. Navigate to the section you want to edit.
 - c. Make the necessary edits.
 - d. Click **Save**.
6. When you are ready to publish your website, click **Save and Publish**.

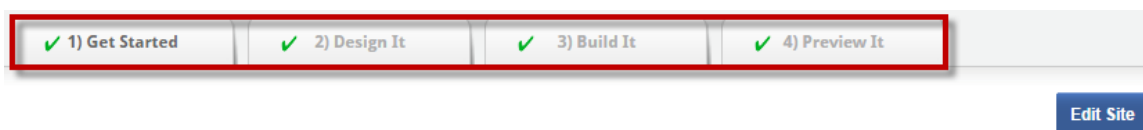
Editing a Page or Subpage

This section describes the process of editing, or updating, your Building Connect website.

To edit your Building Connect website:

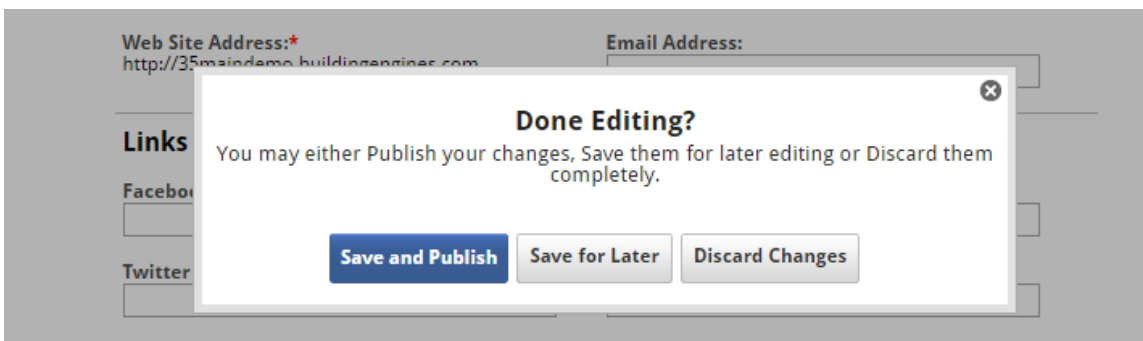
1. Click **Admin → Building Settings → Building Connect**.
2. Click the **Site Name** you want to edit.

3. Click the tab of the section you want to update.



4. Click **Edit Site**.

5. After you finish making your edits, click **Done Editing**, and then select either **Save and Publish**, **Save for Later**, or **Discard Changes**.

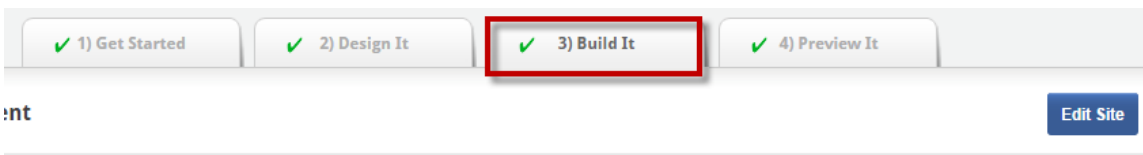


Rearranging Page or Subpage Order

This section describes the process of rearranging the order of your Building Connect website content.

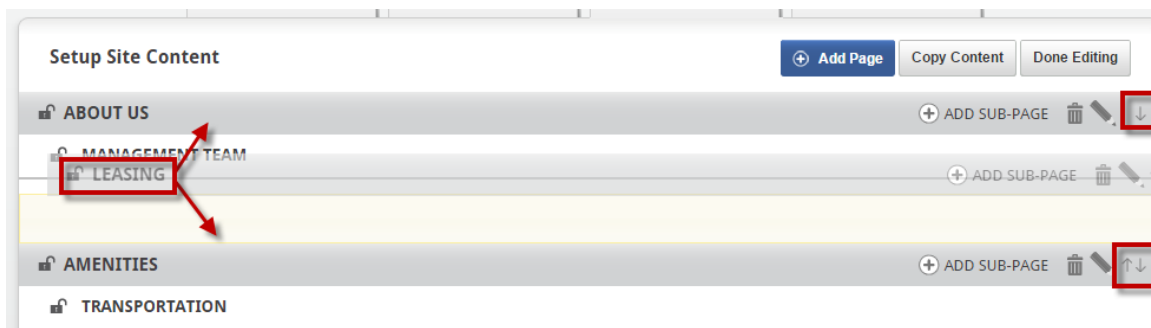
To rearrange the order of your content:

1. Click **Admin → Building Settings → Building Connect**.
2. Click the **Site Name** you want to edit.
3. Click the **Build It** tab of the section you want to update.

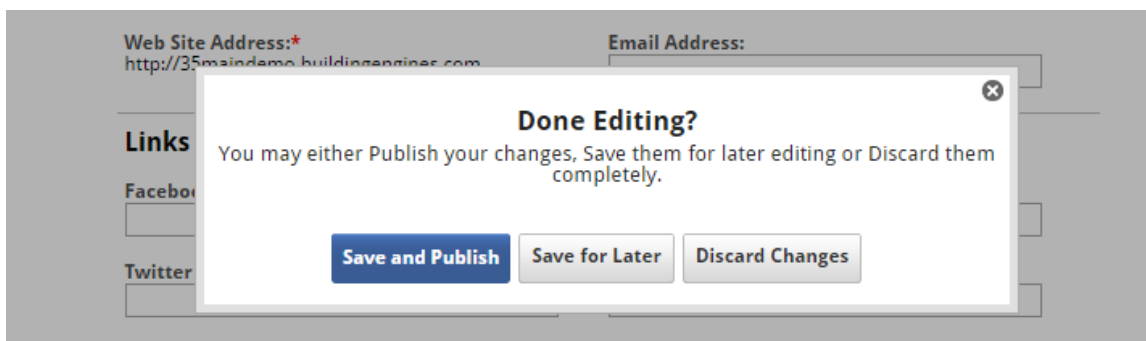


4. Click **Edit Site**.

5. Hover over the section you want to move, and when you see the cursor change into a 4 arrow cross left click your mouse and drag and drop the section into its new order. Alternatively you can use the arrows located on the right side of the section to move content either up or down in order.



6. After you finish making your edits, click **Done Editing**, and then select either **Save and Publish**, **Save for Later**, or **Discard Changes**.

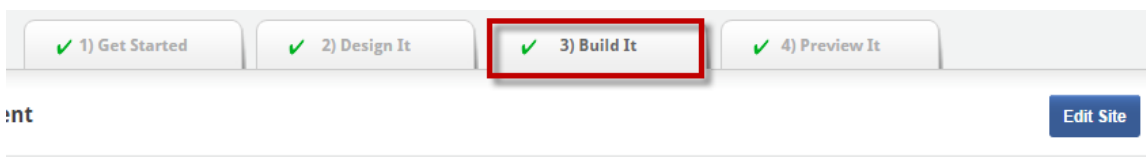


Deleting a Page or Subpage

This section describes the process of deleting content from your Building Connect website.

To delete content from your Building Connect website:

1. Click **Admin → Building Settings → Building Connect**.
2. Click the **Site Name** you want to edit.
3. Click the **Build It** tab of the section you want to update.

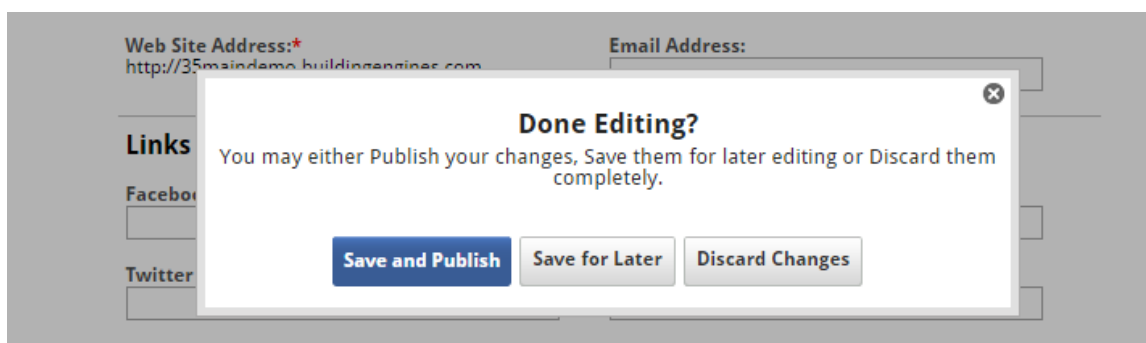


4. Click **Edit Site**.

5. Navigate to section of content you want to delete and click the trash can icon located on the right side of the page.



6. After you finish making your edits, click **Done Editing**, and then select either **Save and Publish**, **Save for Later**, or **Discard Changes**.



To Do Lists


The To-Do List allows you create and manage a list of To-Dos for you and your staff. After a To-Do List is created, To-Dos can be self-assigned or assigned to employees, vendors, or external users. As To-Dos are completed, assignees can update their status and provide all users with visibility into their progress.

This section describes the process of creating, managing, and sharing To-Do Lists.

Creating a To Do List

To Do Lists can be created to provide a simple self-reminder or manage a list of action items for multiple individuals. This section describes the process of creating a To-Do List.

To create a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Click .
3. Provide a **NAME** and an optional **DESCRIPTION** of the To-Do List.
4. Click **SAVE**.

Creating a To-Do

After the To-Do List has been created you can create and assign individual To-Dos for yourself or others. This sections describes how to create a To-Do, or action item.

To create a To-Do for your To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Click the **(+) New To-Do** icon.

4. Select a **BUILDING** and **ASSIGNEE**.
5. Enter the **DETAILS** of the To-Do.
6. (Optional) Use the calendar icon to enter a **DUE DATE**.
7. (Optional) Click **Notify via email** to send an email notification to the To-Do assignee.
8. Click **SAVE** or **SAVE AND ADD ANOTHER** to create another To-Do.

Creating a To Do for a Non-System User

To Dos can be assigned to individuals outside the Building Engines application. When a To-Do for a non-system user is created an alert can be configured to notify the assignee. After the To-Do is completed, the non-system user can respond to the email notification and let the list owner know that the To-Do can be marked as complete. This section describes the process of creating an action item for a non-system user.

To create an action item for a non-system user:

1. Click **Go To → Tasks → To-Do Lists**.

2. Select a To Do List from the left side.
3. Click the **(+) New To-Do** icon.

To-Do Lists

Type to filter +

- End of Month Billing (0 of 0)
- Follow Up (0 of 0)
- Staff Meeting Follow Up Tasks (0 of 0)
- My To-Dos

NAME: End of Month Billing
DESCRIPTION: N/A
CREATED: 07/22/2015
COMPLETED: 0 of 0

SHARE PRINT ACTIONS ADD COMMENT

To-Dos

TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	STATUS
No matching records found					

4. Select a **BUILDING** and enter the To-Do **DETAILS**.
5. Using the **ASSIGN TO** field, select **Non-System User**, and then enter the assignee's **NAME** and **EMAIL** address.

New To-Do

TO-DO LIST
Staff Meeting Follow Up Tasks

BUILDING
Berkshire Crossing

ASSIGN TO
Non-System User

NAME
Bob Smith

EMAIL
bob@gmail.com

DUE DATE

☐ Notify via email

DETAILS

Characters (including HTML): 0 (Limit: 4000)


SAVE SAVE AND ADD ANOTHER CANCEL

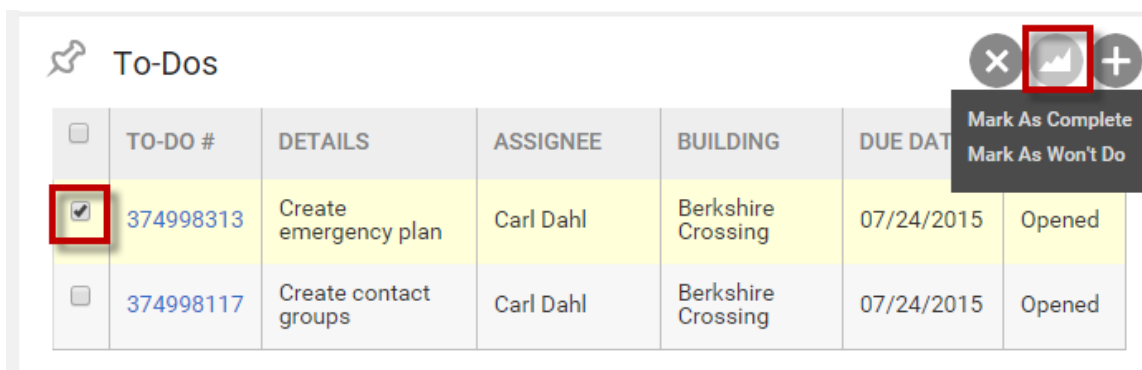
6. (Optional) Use the calendar icon to enter a **DUE DATE**.
7. (Optional) Click **Notify via email** to send an email notification to the action item assignee.
8. Click **SAVE** or **SAVE AND ADD ANOTHER** to create another action item.

Completing a To-Do

After a To-Do has been completed you can update the To-Do to display as completed. This section describes the process of completing a To-Do.

To complete a To-Do:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Check the box located next to the completed To-Do, click the  icon, and select **Mark As Complete**.



<input type="checkbox"/>	TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	
<input checked="" type="checkbox"/>	374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Opened
<input type="checkbox"/>	374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened

4. Confirm by clicking **YES**.

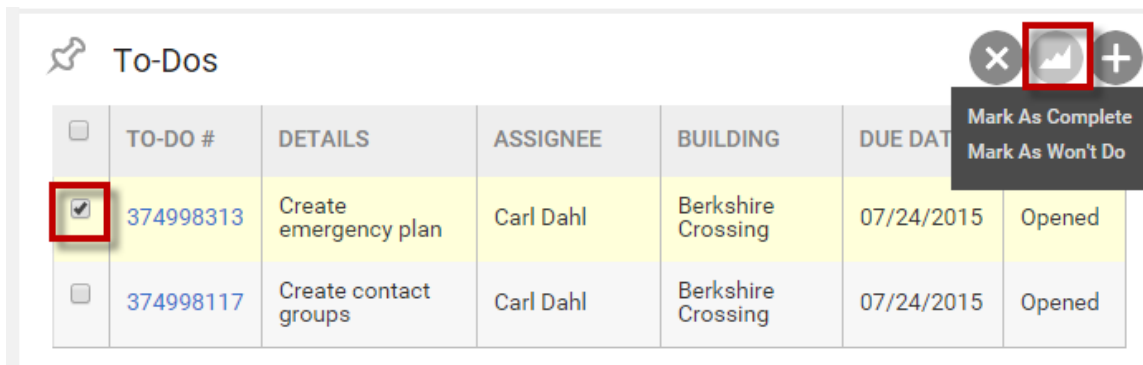
Marking a To-Do as Won't Do

If you choose not to complete a particular To-Do, however, want it to remain on your To-Do List you can mark the To-Do as Won't Do. This section describes the process of marking a To-Do as Won't Do.

To mark a To-Do as Won't Do:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.

3. Check the box located next to the To-Do you are not going to do, click the  icon, and select **Mark As Won't Do**.



The screenshot shows a 'To-Dos' table with columns: TO-DO #, DETAILS, ASSIGNEE, BUILDING, DUE DATE, and STATUS. A red box highlights the checkbox in the first row, which is checked. A dropdown menu is open, showing 'Mark As Complete' and 'Mark As Won't Do' options.

	TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	STATUS
<input checked="" type="checkbox"/>	374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Opened
<input type="checkbox"/>	374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened

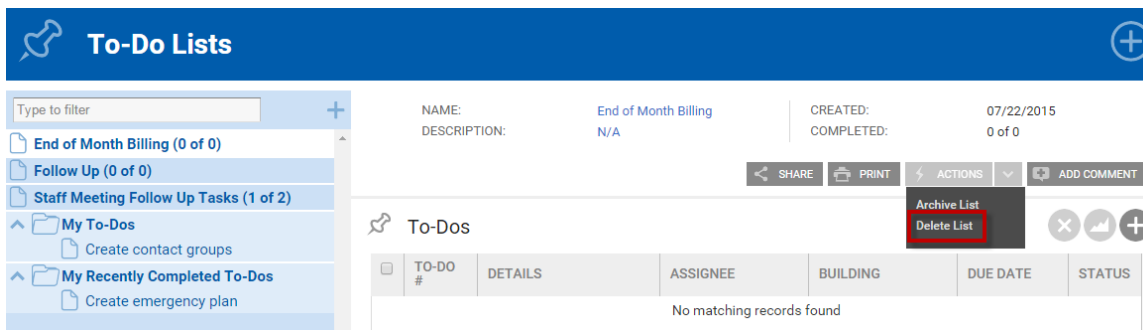
4. Confirm by clicking **YES**.

Deleting a To-Do List

This section describes the process of deleting a To-Do List.

To delete a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select the To-Do List you want to delete.
3. Click **ACTIONS**, and select **Delete List**.




The screenshot shows the 'To-Do Lists' interface. On the left, a list of To-Do Lists is shown, including 'End of Month Billing (0 of 0)', 'Follow Up (0 of 0)', and 'Staff Meeting Follow Up Tasks (1 of 2)'. The 'End of Month Billing' list is selected. On the right, the details for this list are shown, including 'NAME: End of Month Billing', 'DESCRIPTION: N/A', 'CREATED: 07/22/2015', and 'COMPLETED: 0 of 0'. The 'ACTIONS' dropdown menu is open, showing 'Archive List' and 'Delete List' options. A red box highlights the 'Delete List' option.

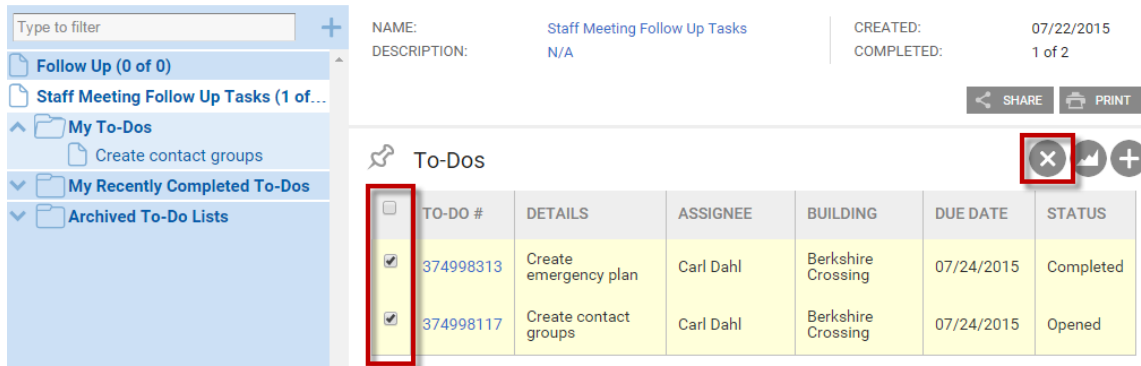
Deleting a To-Do

This section describes the process of deleting a To-Do from a To-Do List.

To delete a To-Do:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.

- Check the box located next to the To-Do(s) you want to delete, and click the  icon.



NAME: Staff Meeting Follow Up Tasks
DESCRIPTION: N/A
CREATED: 07/22/2015
COMPLETED: 1 of 2

SHARE PRINT

To-Dos

TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	STATUS
374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Completed
374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened

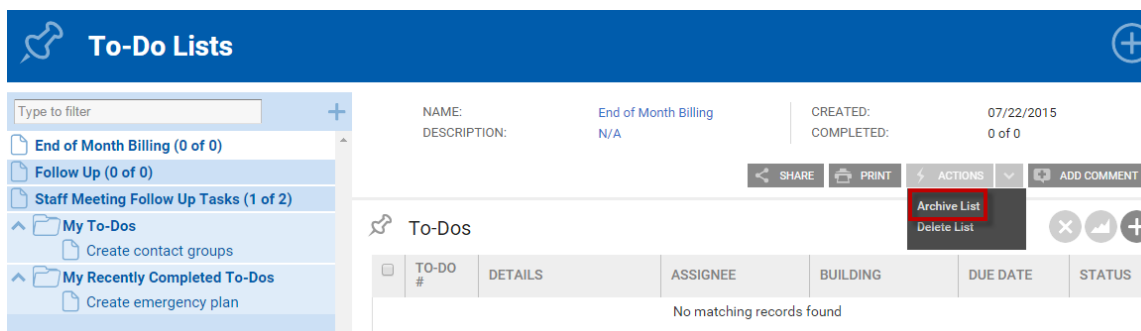
- Confirm by clicking **YES**.

Archiving a To-Do List

After all of the To-Dos on your list have been completed you can archive the To-Do List into the Archive To-Do Lists folder. This section describes the process of archiving a To-Do List.

To archive a To-Do List:

- Click **Go To → Tasks → To-Do Lists**.
- Select the To-Do List you want to archive.
- Click **ACTIONS** and select **Archive List**.



To-Do Lists

NAME: End of Month Billing
DESCRIPTION: N/A
CREATED: 07/22/2015
COMPLETED: 0 of 0

SHARE PRINT ACTIONS ADD COMMENT

Archive List
Delete List

To-Dos

TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	STATUS
No matching records found					

- Click **YES** to confirm.

Sharing a To-Do List

To-Do Lists can be shared with system users and non-system users. The PDF To-Do List attachment includes all of the individual To-Dos, current status, and their due dates. This section describes how to share a To-Do List.

To share a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Click the To-Do List you want to share.
3. Click **SHARE**.

The screenshot shows the 'To-Do Lists' interface. On the left is a sidebar with a search bar 'Type to filter' and a list of folders: 'Follow Up (0 of 0)', 'Staff Meeting Follow Up Tasks (1 of ...)', 'My To-Dos' (containing 'Create contact groups'), 'My Recently Completed To-Dos', and 'Archived To-Do Lists'. The main area displays details for 'Staff Meeting Follow Up Tasks' with fields for NAME, DESCRIPTION, CREATED, and COMPLETED. Below this is a 'To-Dos' section with a table of tasks. A red box highlights the 'SHARE' button in the top right corner of the main area.

TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	STATUS
374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Completed
374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened

4. (Optional) The **SUBJECT**, **MESSAGE**, and **SENDER ALIAS** fields can be edited by clicking within the field and entering custom information.
5. Use the recipient builder to select your recipients.
6. Click **SEND**.

Printing a To-Do List

This section describes the process of printing a To-Do List.

To print a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Click the To-Do List you want to print.
3. Click **PRINT**.

This screenshot is identical to the one above, showing the 'To-Do Lists' interface. However, a red box highlights the 'PRINT' button in the top right corner of the main area, next to the 'SHARE' button.

TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	STATUS
374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Completed
374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened

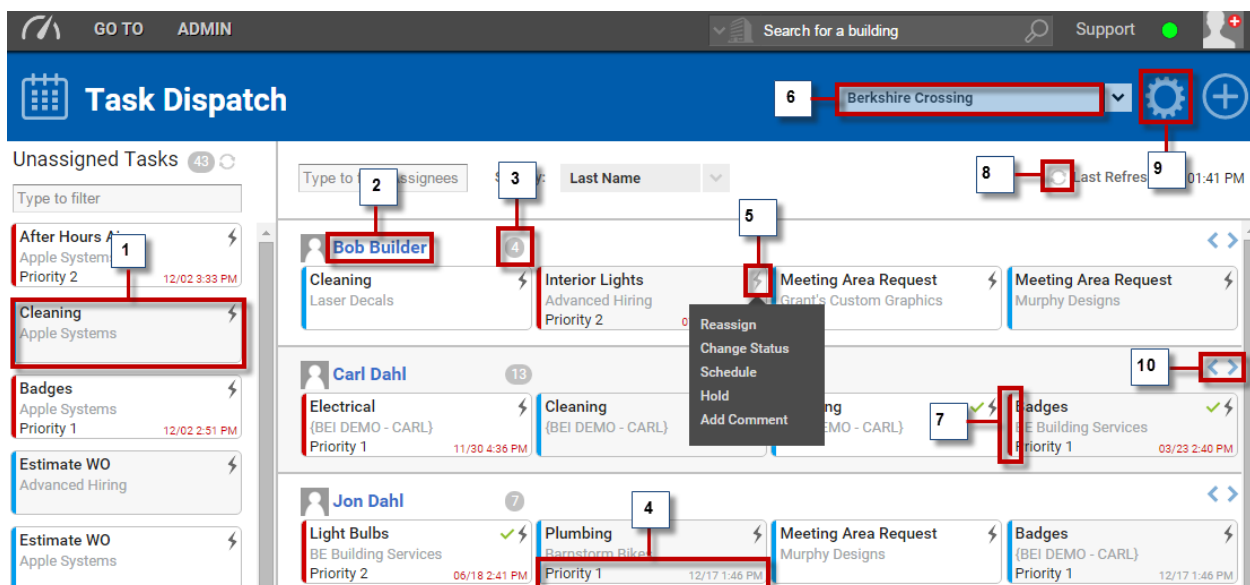
Task Dispatch

The Task Dispatch dashboard provides a visualization and command center for your building's work orders. Using the dashboard, you can quickly view an assignee's workload, re-assign work orders, change statuses, place work orders on hold, and add comments.



This section describes where each Task Dispatch component is located and how it functions.

Navigating the Task Dispatch Dashboard

The following image illustrates common functionality within the Task Dispatch dashboard.



1. **Work Order:** Work Order cards display the issue type, tenant or building, priority level and time until metric violation, and criticality. To view more detail, hover over the work order card until the full detail box appears.
2. **Assignee:** This area displays the assignee and their assigned work orders.
3. **Work Order Number:** This number denotes the number of work orders assigned to a user.
4. **Priority and Time:** If configured, this area displays the priority level and time until metric is violated.
5. **Work Order Actions:** The ⚡ allows you to quickly reassign, change status, schedule, place a hold, or add a comment to a work order.
6. **Building/Region Selector:** Use this to select a building and/or region.
7. **Red Work Order Card:** Red Work Order cards are denoted as critical.

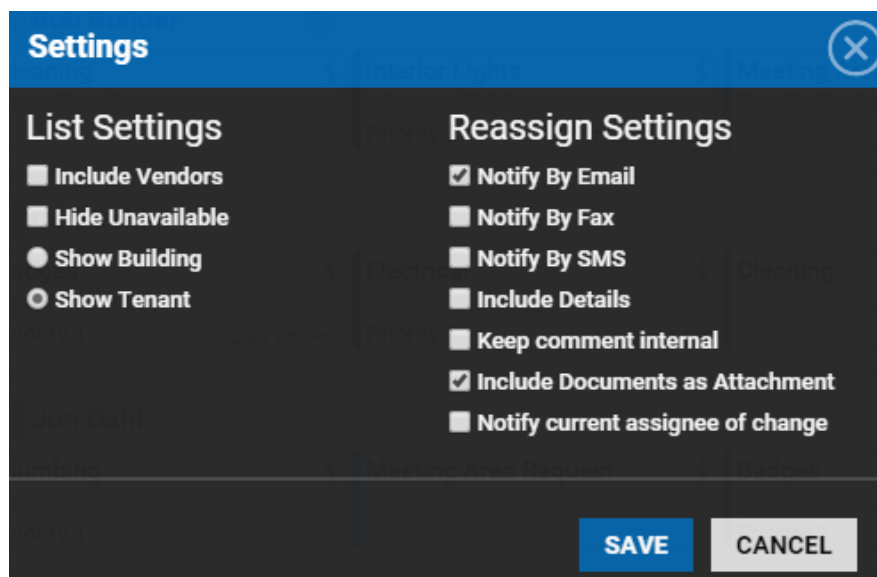
8. **Refresh:** The Task Dispatch dashboard refreshes every five minutes, however, you can manually refresh both the **Unassigned** column and Assignee column independently of one another by clicking the  that corresponds to the column you want refreshed.
9. **Settings:** Adjust listing and assignment preferences.
10. **Work Order Toggle:** Use the  to access additional work orders.

Configuring the List and Reassignment Settings

The Task Dispatch dashboard allows you to customize your dashboard lists and reassignment settings. This section describes how to edit your settings to your preference.

To configure your List and Reassignment settings:

1. Click **Go To → Tasks → Task Dispatch**.
2. Click the Settings icon .
3. Select your list and reassignment preferences, and click **SAVE**.



The image shows a 'Settings' dialog box with a blue header bar containing the title 'Settings' and a close button (X). The dialog is divided into two columns: 'List Settings' and 'Reassign Settings'. Under 'List Settings', there are four options: 'Include Vendors' (checkbox), 'Hide Unavailable' (checkbox), 'Show Building' (radio), and 'Show Tenant' (radio). Under 'Reassign Settings', there are seven options: 'Notify By Email' (checkbox), 'Notify By Fax' (checkbox), 'Notify By SMS' (checkbox), 'Include Details' (checkbox), 'Keep comment internal' (checkbox), 'Include Documents as Attachment' (checkbox), and 'Notify current assignee of change' (checkbox). At the bottom right, there are two buttons: 'SAVE' (blue) and 'CANCEL' (grey).

Settings	
List Settings	Reassign Settings
<input type="checkbox"/> Include Vendors	<input checked="" type="checkbox"/> Notify By Email
<input type="checkbox"/> Hide Unavailable	<input type="checkbox"/> Notify By Fax
<input type="radio"/> Show Building	<input type="checkbox"/> Notify By SMS
<input checked="" type="radio"/> Show Tenant	<input type="checkbox"/> Include Details
	<input type="checkbox"/> Keep comment internal
	<input checked="" type="checkbox"/> Include Documents as Attachment
	<input type="checkbox"/> Notify current assignee of change
SAVE CANCEL	

Configuring Employee Hours

Configuring employee hours in Task Dispatch allows you to see which employees are available in real-time. This allows you to make better informed decisions with your work order assignments. This section describes how to configure employee hours.

To configure employee hours:

1. Click **Admin → Employees**.
2. Use the **SEARCH** and column filters to locate the employee you want to configure hours for.
3. Click the employee **NAME**.
4. Navigate to the **Employee Hours** section, and enter the days and times the employee is available. *Note: Employee Hours are ONLY relevant to the Task Dispatch functionality. The following image is an example of Employee Hours.*

Employee Hours ⓘ

	Sunday	Monday	Tuesday	Wednesday
Start Time ⓘ		08:00 AM ⓘ	08:00 AM ⓘ	08:00 AM ⓘ
End Time ⓘ		05:00 PM ⓘ	05:00 PM ⓘ	05:00 PM ⓘ

[SAVE](#)
[RESET PASSWORD](#)
[CHANGE PASSWORD](#)
[USER AUDIT](#)
[CONFIGURE OUT OF OFFICE](#)

5. Click **SAVE**.
6. After **Employee Hours** are configured, and if the employee is not available, the employee's row is displayed with a peach color. *Note: The following image is example of an employee who is not available.*

The screenshot displays the 'Employee Hours' configuration page for three employees. Jon Dahl's row is white, Carl Dahl's row is peach-colored, and Joe Giarusso's row is white. Each row shows a list of work orders assigned to that employee. For Carl Dahl, the work orders are 'Electrical (BEI DEMO - CARL)', 'Cleaning (BEI DEMO - CARL)', 'Cleaning (BEI DEMO - CARL)', 'Badges (BEI DEMO - CARL)', and 'Light B (BEI DEMO - CARL)'. The peach color highlights that Carl Dahl is not available during the specified time period (12:00 PM - 05:00 PM).

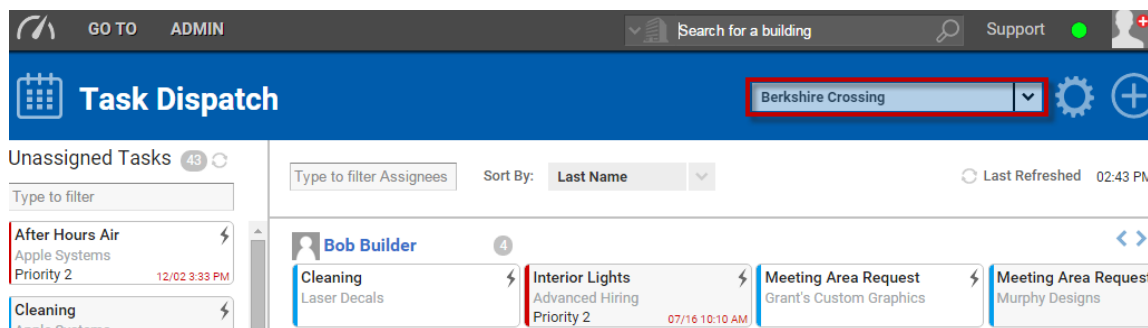
Viewing Work Orders Assigned to an Employee


This section describes how to view the work orders assigned to an employee using the Task Dispatch dashboard.

To view work orders assigned an employee:

1. Click **Go To → Tasks → Task Dispatch**.

2. Select a building or region.



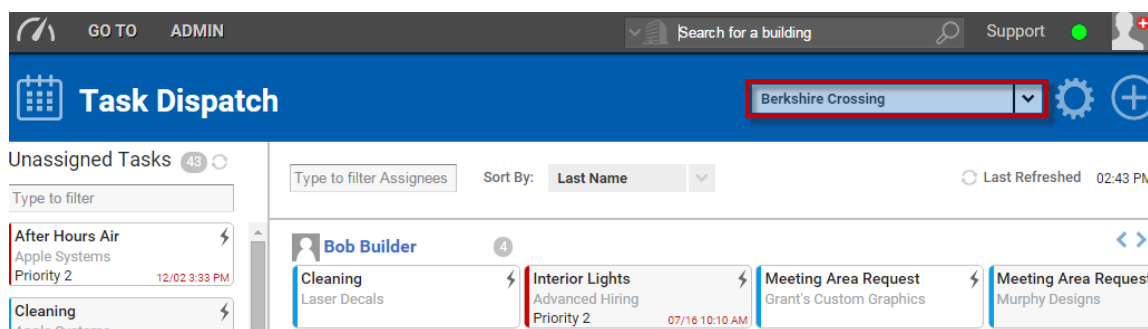
3. (Optional) Use the Assignee filter to locate a particular employee.
4. Navigate to the appropriate assignee to view the work order cards assigned to that employee.
5. (Optional) If some instances you may need to use the side scroll arrows  to access the full list of work order cards.

Assigning a Work Order to an Employee

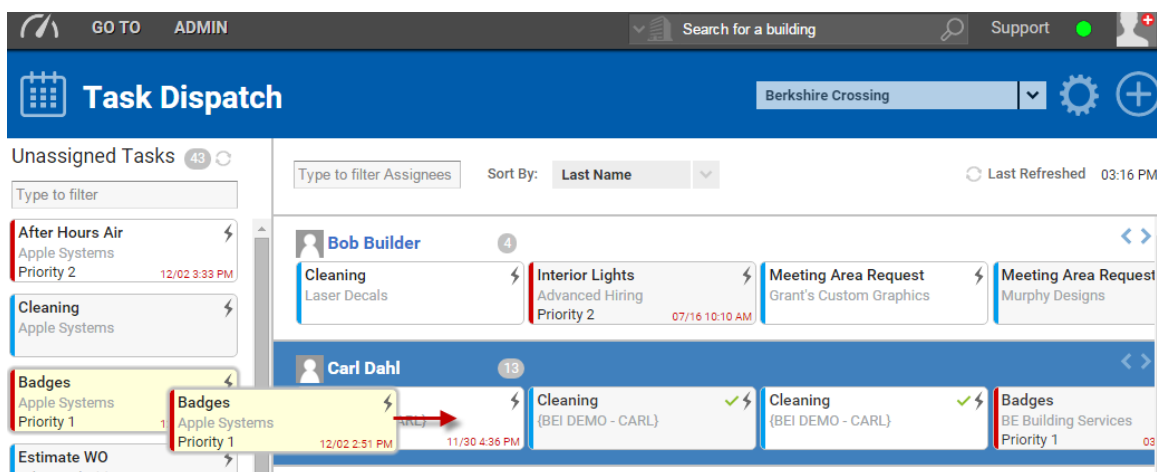
This section describes how to assign a work order to an employee using the Task Dispatch dashboard.

To assign a work order to an employee:

1. Click **Go To → Tasks → Task Dispatch**.
2. Select a building or region.



- Click a work order card from the **Unassigned Tasks** column, and then drag and drop it to the employee you want it assigned to. *Note: Work order cards can also be reassigned from one employee to another using the same click, drag and drop methodology.*



Impairments

The Impairments module allows you to configure custom notification profiles, identify the types of impairments unique to your portfolio, and manage the lifecycle of a temporarily decommissioned piece of equipment. Once configured, users can quickly identify impaired equipment, as well as the records associated to impairment.

Configuring the Impairments Module

Setup and configuration of the Impairments module must be completed prior to implementing this module. If you are unable to access the Impairments Admin section, please reach out to Building Engines Support for assistance.



This section describes the process of creating and assigning key contacts, setting up notification profiles, and identifying the types of impairments unique to your portfolio.

Creating Key Contact Roles

Key Contacts roles are the role names of the person(s) you plan to notify when a piece of equipment is temporarily decommissioned. Some examples of Key Contact roles may include: Property Manager, Fire Chief, and Insurance Agent. In most cases, the role names in this section should have a vested interest in the piece of equipment being impaired.

This section describes the process of creating Key Contact roles for your portfolio.
Note: The role names identified in this section are shared across the entire portfolio.

To create a Key Contact role:

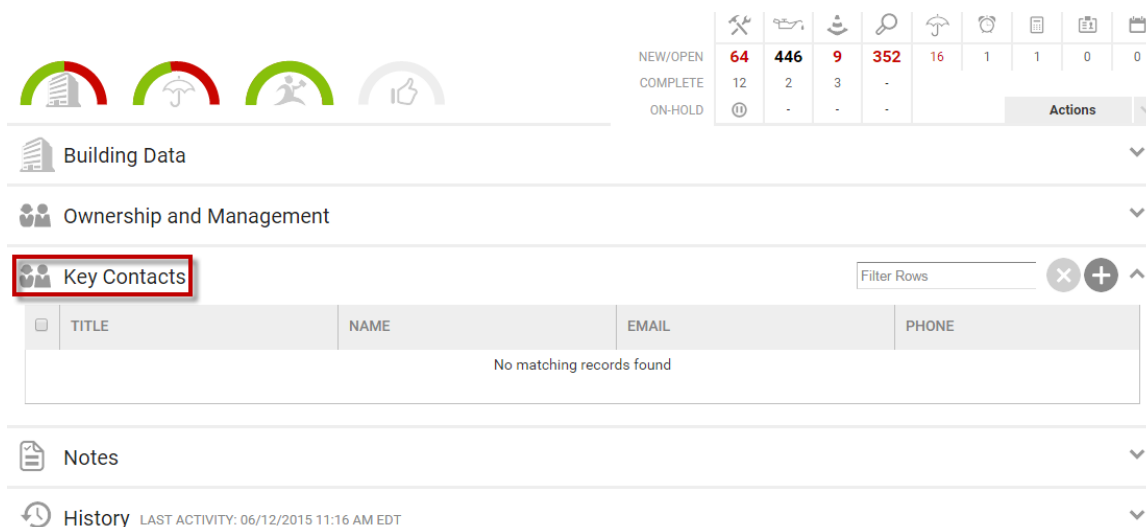
1. Click **Admin → System Labels**.
2. Navigate to and click on the **KEY CONTACTS** category.
3. Click the **Add Key Contacts** .
4. Use the **Add Key Contacts** field to enter your key contact role name.
5. Click **SAVE**.
6. (Optional) Repeat steps 3-5 until all Key Contact roles have been created.
7. (Optional) To remove a Key Contact role, select the box located to the left of the role name and click .

Assigning Key Contact Roles

After your Key Contact Roles have been defined and created you need to assign a staff member or contact to each role. This assignment directs the application to notify the appropriate person during an equipment Impairment.

To assign a user to a Key Contact role:


1. Click **Go To → Building List**.
2. Select a **BUILDING** name.
3. Navigate to **Key Contacts** and click to expand the section.



The screenshot displays the Building Engines interface. At the top, there are four circular icons representing different building types. To the right, a summary table shows counts for various statuses:

	NEW/OPEN	COMPLETE	ON-HOLD							
NEW/OPEN	64	446	9	352	16	1	1	0	0	
COMPLETE	12	2	3	-						
ON-HOLD	11	-	-	-						

Below the table, the 'Key Contacts' section is expanded, showing a table with columns: TITLE, NAME, EMAIL, and PHONE. The table currently displays 'No matching records found'. To the right of the table, there are icons for adding (+) and removing (-) records, and a 'Filter Rows' input field.

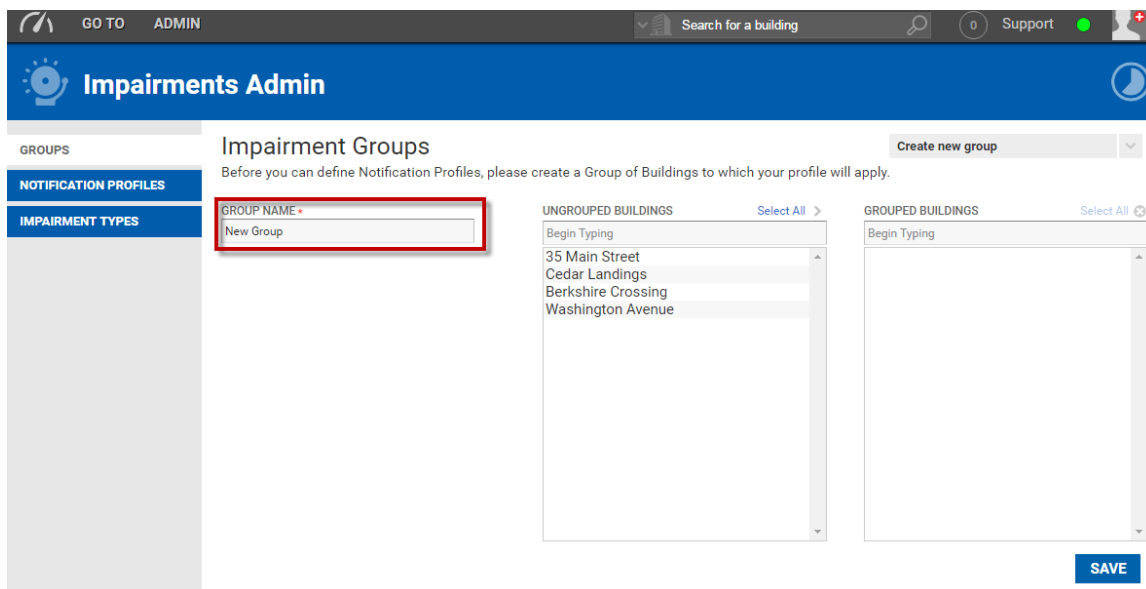
4. Click the **Add Contact** .
5. Using the **Add Contact** pop-up, select a **CONTACT TYPE**, a **CONTACT**, and click **SAVE**. *Note: To assign the role to a non-system user, select **Custom User** and enter the required information.*
6. Click **SAVE**.
7. Repeat steps 4-7 until all Key Contact roles have been assigned.
8. (Optional) To assign Key Contact roles for the rest of the buildings, repeat steps 2-7.

Creating an Impairment Group


Impairment groups allow you to setup unique Notification Profiles and Impairment Types by building or groups of buildings. This section describes the process of creating an Impairment group.

To create an Impairment group:

1. Click **Go To → Impairments → Impairments Admin**.
2. Select **Create New Group** from the dropdown.
3. Enter a **GROUP NAME**.



The screenshot shows the 'Impairments Admin' page. On the left is a sidebar with 'GROUPS' selected, containing 'NOTIFICATION PROFILES' and 'IMPAIRMENT TYPES'. The main area is titled 'Impairment Groups' and includes a 'Create new group' dropdown. Below this is a message: 'Before you can define Notification Profiles, please create a Group of Buildings to which your profile will apply.' There are two columns: 'UNGROUPED BUILDINGS' and 'GROUPED BUILDINGS'. The 'UNGROUPED BUILDINGS' column has a 'Select All' link and a list of buildings: '35 Main Street', 'Cedar Landings', 'Berkshire Crossing', and 'Washington Avenue'. The 'GROUPED BUILDINGS' column also has a 'Select All' link and is currently empty. A 'SAVE' button is located at the bottom right of the interface.


4. Click the building(s) names from the **UNGROUPED BUILDINGS** column. If all buildings are part of the group you can alternatively click **Select All**.
5. Click  to move the building(s) from the **UNGROUPED BUILDINGS** column to the **GROUPED BUILDINGS** column.

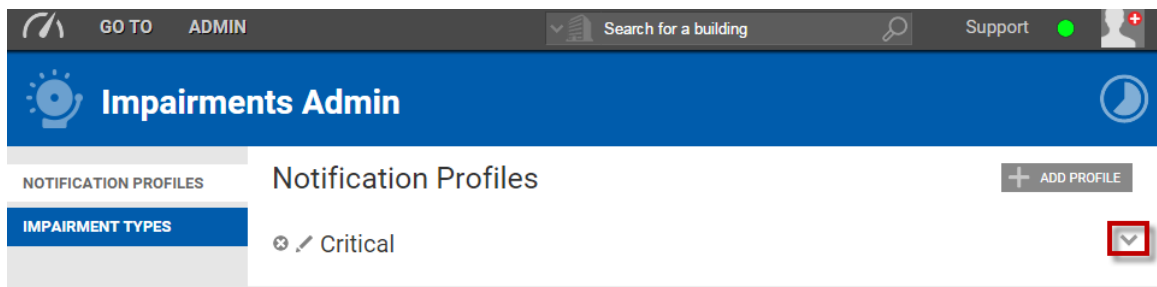
6. Click **SAVE**.
7. (Optional) Repeat steps 2-6 until all groups have been created.


Creating a Notification Profile





The Notification Profile allows you to define the Key Contact Role and Impairment status(es) that trigger the notification and/or reminder. This section describes the process of creating a notification profile.


To create a Notification Profile:

1. Click **Go To → Impairments → Impairments Admin**.
2. Click .
3. Using the **Add Profile** pop-up box, enter the profile name and click **SAVE**.
4. Click the down arrow to expose the configurable role and impairment status.




5. Click **Add Rule** .
6. Select the **ROLE** and Impairment status that triggers a notification and/or reminder.
7. Click **SAVE**.

<input type="checkbox"/>	ROLE	CREATED	EXTENDED	RESTORED	DUE DATE	OVERDUE BY(x MINS)
<input type="checkbox"/>	Property Manager 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

SAVE


8. (Optional) To create additional notification rules, repeat steps 5-7.
9. (Optional) To create additional profiles, repeat steps 2-8.

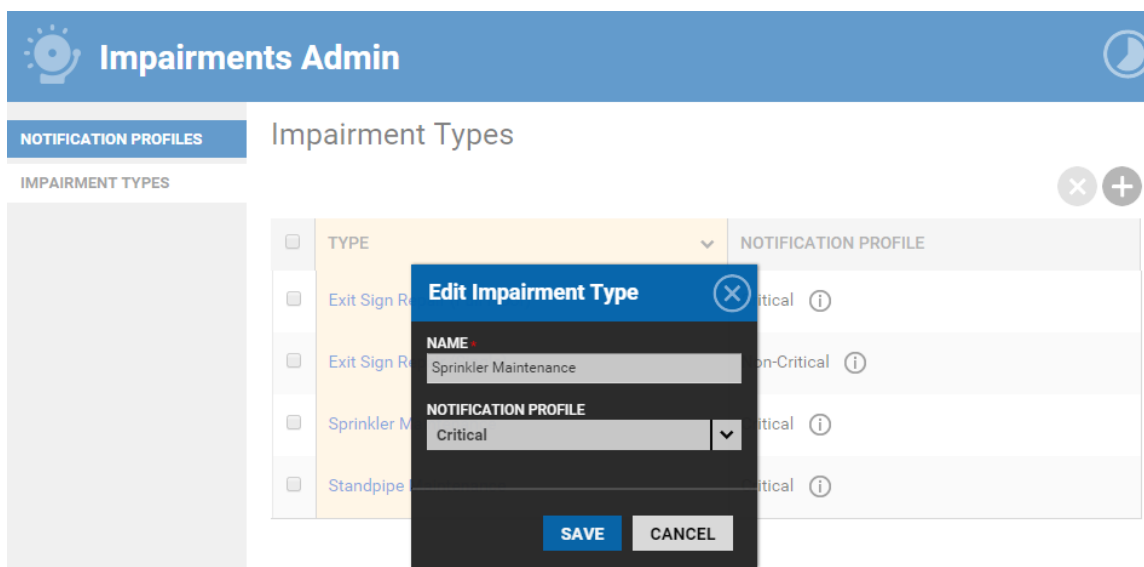
- 10.(Optional) To delete a rule, click the check box located to the left of the rule and click .


Defining Impairment Types

After configuring the Notification Profiles you need to define the types of Impairments you'll be tracking. Examples of an Impairment Type may include: sprinkler maintenance, emergency sign repair, and standpipe maintenance. This section describes the process of creating Impairment Types and then linking each to a Notification Profile.

To create an Impairment Type:

1. Click **Go To → Impairments → Impairments Admin.**
2. Click **IMPAIRMENT TYPES.**
3. Click **Add Types** .
4. Enter the Impairment Type **NAME**, select a **NOTIFICATION PROFILE**, and click **SAVE.**



5. (Optional) To create additional Impairment Types, repeat steps 3-4 until you have all of your types entered and linked to the appropriate Notification Profile.
6. (Optional) To delete an Impairment Type, click the box located to the left of the type, and click .

Managing the Impairment Lifecycle


The Impairments module allows you to manage the lifecycle of a decommissioned piece of equipment. This section describes the process of creating, extending, and restoring an equipment impairment.

Creating an Impairment

This section describes the process of creating an impairment.

To create an impairment:


1. Click **Go To → Impairments → Create Impairment**.
2. Select a **BUILDING**, **IMPAIRMENT TYPE**, and use the **SYSTEM(s)** field to enter in the specific system being decommissioned.

3. Use the calendar icon to select a **START DATE** and time.
4. Enter the Impairment **DURATION** and **DESCRIPTION**.
5. (Optional) To link the Impairment to an existing work order or preventive maintenance task, enter the number in the **LINKED TASK** field and click  to validate.
6. Click **SAVE** to create the impairment.

Adding a Comment to an Impairment

This section describes the process of adding a comment to an existing equipment impairment.


To add a comment to an impairment:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the impairment.
3. Click the impairment number.
4. Click  .

Adding a File to an Impairment

This section describes the process of adding a file to an existing equipment impairment.

To add a file to an impairment:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the impairment.
3. Click the impairment number.
4. Navigate to the **Files** section of the impairment and click **Upload New File**  .
5. Using the **Upload New File(s)** pop-up box, either click **ADD FILES** to attach the file, or drag and drop the file into the pop-up box.
6. Click **SAVE**.

Linking a Work Order or Preventive Maintenance Task to an Impairment

This section describes the process of linking a work order or preventive maintenance task to an existing equipment impairment.

To link a work order or preventive maintenance task to an impairment:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the impairment.
3. Click the impairment number.

4. Click **Add Linked Task**.

GO TO ADMIN Search for a building Support

#459484370 - Sprinkler Maintenance
Berkshire Crossing


CREATED BY: Carl Dahl

BUILDING: Berkshire Crossing
IMPAIRMENT TYPE: Sprinkler Maintenance
STATUS: Completed
LINKED TASK: **Add Linked Task**

DATE CREATED: 03/08/2016 09:45 AM
START DATE: 03/08/2016 09:45 AM
RESTORED: 03/08/2016 02:08 PM
DURATION: 4H 14M

System(s): Sprinkler system maintenance
Description: Clean sprinkler heads on 1st floor

ADD COMMENT

5. Enter the work order or preventive maintenance number in the **LINKED TASK** field and click  to validate.

6. Click **SAVE**.

Extending an Impairment

In some instances, equipment impairments may last longer than originally expected. When this occurs you can prevent the impairment from going into an overdue state by adding a time extension. This section describes the process of extending an impairment.

To extend an impairment:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the impairment.
3. Click the impairment number.
4. Click **EXTEND**.

GO TO ADMIN Search for a building Support

#459484894 - Exit Sign Repair (Single)
Berkshire Crossing

CREATED BY: Carl Dahl

BUILDING: Berkshire Crossing
IMPAIRMENT TYPE: Exit Sign Repair (Single)
STATUS: Submitted
LINKED TASK: Add Linked Task

DATE CREATED: 03/08/2016 02:54 PM
START DATE: 03/08/2016 02:54 PM
EST. RESOLUTION: 03/08/2016 03:54 PM
ESTIMATED DURATION: 0H 59M

System(s): 2nd Floor Exit sign
Description: Change bulbs

ADD COMMENT **EXTEND** RESTORE

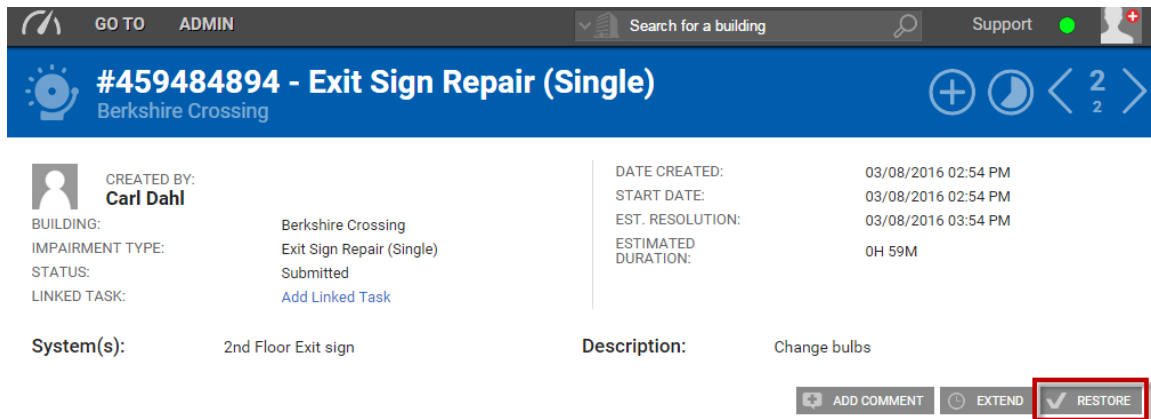
5. Enter the **EXTEND DURATION**, a **COMMENT** regarding the extension, and click **SAVE**.

Restoring an Impairment

After a piece of equipment has been re-commissioned you need to confirm its restoration. This section describes the process of restoring an impaired piece of equipment.

To restore an impairment:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the impairment.
3. Click the impairment number.
4. Click **RESTORE**.



GO TO ADMIN Search for a building Support

#459484894 - Exit Sign Repair (Single)

Berkshire Crossing

CREATED BY: Carl Dahl

BUILDING: Berkshire Crossing

IMPAIRMENT TYPE: Exit Sign Repair (Single)

STATUS: Submitted

LINKED TASK: Add Linked Task

DATE CREATED: 03/08/2016 02:54 PM

START DATE: 03/08/2016 02:54 PM

EST. RESOLUTION: 03/08/2016 03:54 PM

ESTIMATED DURATION: 0H 59M

System(s): 2nd Floor Exit sign

Description: Change bulbs

ADD COMMENT EXTEND RESTORE

5. (Optional) Enter a comment.
6. Click **SAVE**.

Cancelling an Impairment

If a scheduled Impairment is created in error or is no longer relevant you have the ability to cancel it before it begins. *Note: Once an Impairment begins the cancel button is no longer displayed.* This section describes the process of cancelling an Impairment.

To cancel an Impairment:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the impairment.
3. Click the impairment number.

4. Click .

Impairments Dashboard

The Impairments dashboard provides a user friendly way of organizing, exporting, and sharing impairment lists with colleagues. This section describes the process of performing each of these actions.

Searching for an Impairment

This section describes the process of searching for an existing equipment impairment.

To search for an impairment:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Click **SEARCH**.
3. Select the **BUILDING**, **TYPE**, and **DATE START** (if known) of the impairment you are searching.
4. Click **SEARCH** to execute the search.

Exporting a List of Impairments

Lists of Impairments can be exported via a few different formats. This section describes how to export a list of impairments.

To export a list of impairments:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Use the **SEARCH** and/or column filters to filter the impairment list.
3. Check the boxes that correspond to the impairments you want to send, click **SHARE**, and select your preferred format.

Sharing a List of Impairments

Lists of Impairments can be shared amongst colleagues and staff via a few different formats. This section describes how to share a list of impairments.

To share a list of impairments:

1. Click **Go To → Impairments → Impairments Dashboard**.
2. Use the **SEARCH** and/or column filters to filter the impairment list.

3. Check the boxes that correspond to the impairments you want to send, click **SHARE**, and select your preferred format.
4. Complete the required information on the Message widget, and click **SEND**.

User Defined Fields

User Defined Fields (UDFs) allow you to create unique fields and page layouts for the Building and Equipment record pages. This functionality allows you to enter additional information and/or customize the page beyond its default appearance.

To accommodate various types of data, fields can be created as a text field, text area, numeric field, radio buttons, select list, multi-select list, checkbox, and date picker.

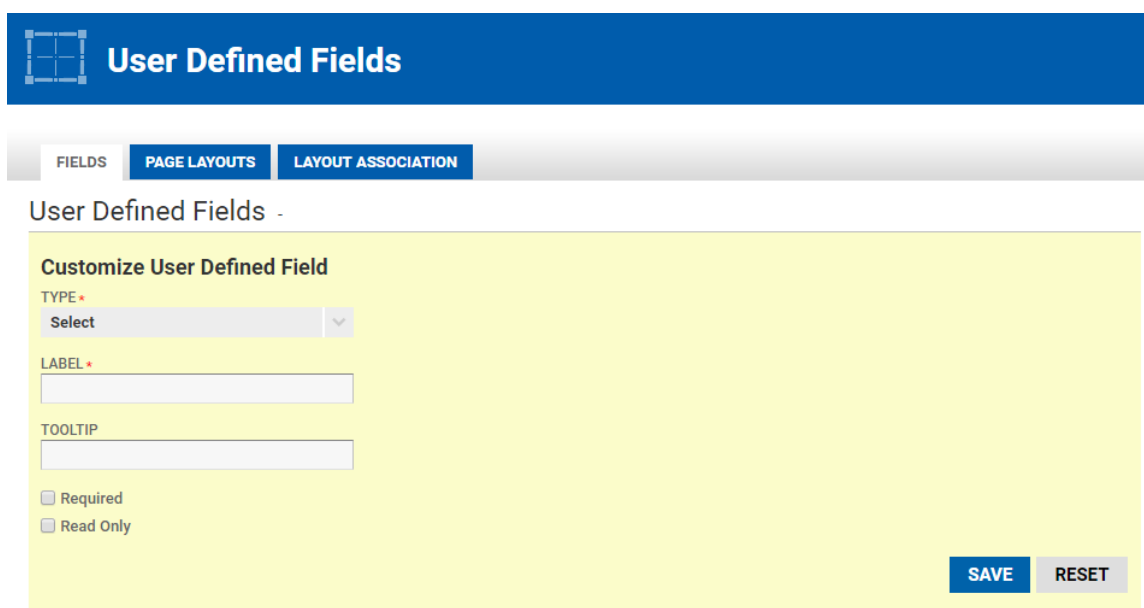
This section describes the process of creating custom fields and page layouts, and then applying both to the desired area within the application.

Creating a User Defined Field

A User Defined Field (UDF) allows you to create a custom field that captures important information on the Building and Equipment record pages. This section describes the process of creating a User Defined Field.

To create a User Defined Field (UDF):

1. Click **Admin → User Defined Fields**.
2. Click the **FIELDS** tab.



The screenshot displays the 'User Defined Fields' interface. At the top, there is a blue header bar with the text 'User Defined Fields' and a small icon. Below this, there is a tabbed interface with three tabs: 'FIELDS', 'PAGE LAYOUTS', and 'LAYOUT ASSOCIATION'. The 'FIELDS' tab is currently selected. Below the tabs, the text 'User Defined Fields -' is visible. The main content area is a yellow box titled 'Customize User Defined Field'. Inside this box, there are three input fields: 'TYPE' with a dropdown menu showing 'Select', 'LABEL' with a text input field, and 'TOOLTIP' with a text input field. Below these fields, there are two checkboxes: 'Required' and 'Read Only'. At the bottom right of the yellow box, there are two buttons: 'SAVE' and 'RESET'.


3. Select a field **TYPE**.

4. Enter a field **LABEL**.
5. (Optional) Use the **TOOLTIP** field to enter additional information or field guidance to the end-user.
6. (Optional) Click **Required** to make the field required before saving.
7. (Optional) Click **Read Only** to make the field a read only field.
8. Click **SAVE**.


Editing a User Defined Field

This section describes the process of editing a user defined field.

To edit a User Defined Field (UDF):

1. Click **Admin → User Defined Fields**.
2. Click the **FIELDS** tab.
3. Navigate down the list of custom fields and click the  that corresponds to the field that you want to edit.




  TANK CAPACITY 	<input type="text"/>
  TYPE OF PRODUCT 	<div>Select </div>
  TYPE OF TANK 	<div>Select </div>

4. Make your edits and click SAVE.

Deactivating a User Defined Field

This section describes the process of deactivating a user defined field. *Note: Deactivating a field that contains equipment or building specific information ONLY hides the data. Information within a hidden field is NOT deleted. Fields that have been deactivated can be reactivated at a later point in time.*

To deactivate a User Defined Field (UDF):

1. Click **Admin → User Defined Fields**.
2. Click the **FIELDS** tab.
3. Navigate down the list of custom fields and click the  that corresponds to the field that you want to deactivate.



TANK CAPACITY ⓘ

TYPE OF PRODUCT ⓘ


TYPE OF TANK ⓘ

- Click **YES** to confirm field deactivation.
- (Optional) To reactivate a field, navigate to the bottom of the page, and click **Deactivated Fields**.

Deactivated Fields



TANK CAPACITY ⓘ


- (Optional) Locate the field you want to reactivate and click .

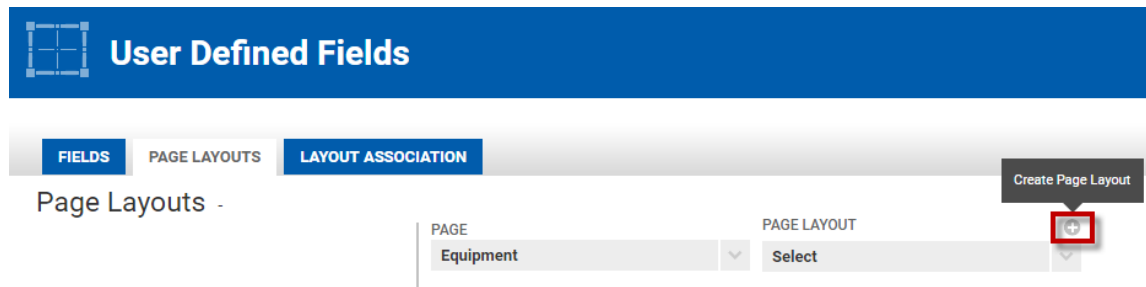
Creating an Equipment Page Layout

After your equipment specific User Defined Fields (UDFs) have been created, you have the ability to organize and add them to your Equipment and Building pages. In order to capture the most important equipment information, in the most ideal format, page layouts can be customized to each of the categories in the Preventive Maintenance module.

This section describes how to create a customized Equipment page layout using your User Defined Fields.

To create a new equipment page layout:

- Click **Admin → User Defined Fields**.
- Click the **PAGE LAYOUTS** tab.
- Using the **PAGE** field, select **Equipment**.
- Click the **Create Page Layout**  icon.



User Defined Fields

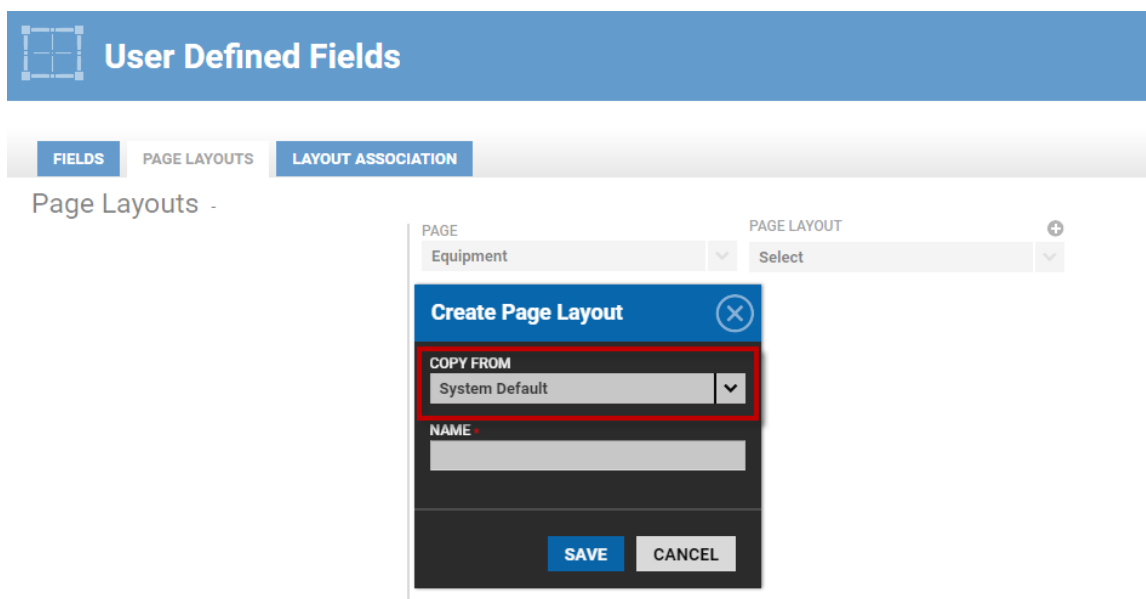
FIELDS **PAGE LAYOUTS** **LAYOUT ASSOCIATION**

Page Layouts -

PAGE	PAGE LAYOUT
Equipment	Select

Create Page Layout

5. Enter a page layout **NAME**.
6. (Optional) To begin creating a new page layout using a previous page layout as a starting point, select a page from the **COPY FROM** field.



The screenshot shows the 'User Defined Fields' interface with the 'PAGE LAYOUTS' tab selected. A modal window titled 'Create Page Layout' is open. The modal has a 'COPY FROM' dropdown menu with 'System Default' selected, a 'NAME' text input field, and 'SAVE' and 'CANCEL' buttons at the bottom. The background interface shows a 'PAGE' dropdown with 'Equipment' selected and a 'PAGE LAYOUT' dropdown with 'Select' selected.


7. Click **SAVE**. Note: For instruction on customizing and/or editing an equipment page layout, refer to **Editing a Page Layout**.

Creating a Building Page Layout

After your building specific User Defined Fields (UDFs) have been created, you have the ability to organize and add them to the existing Building page.

This section describes how to create a customized Building page layout using your User Defined Fields.

To create a new building page layout:

1. Click **Admin → User Defined Fields**.
2. Click the **PAGE LAYOUTS** tab.
3. Using the **PAGE** field, select **Building**.
4. Click the **Create Page Layout**  icon.

5. Enter a Page Layout **NAME**.

The screenshot shows the 'User Defined Fields' interface. At the top is a blue header with a grid icon and the text 'User Defined Fields'. Below this is a tab bar with three tabs: 'FIELDS', 'PAGE LAYOUTS', and 'LAYOUT ASSOCIATION'. The 'PAGE LAYOUTS' tab is selected. Below the tabs, the text 'Page Layouts -' is visible. On the right, a 'Create Page Layout' modal is open. The modal has a blue header with a close button. It contains two fields: 'COPY FROM' with a dropdown menu showing 'None', and 'NAME' with a text input field containing 'Additional Building Information'. At the bottom of the modal are 'SAVE' and 'CANCEL' buttons. In the background, a table is partially visible with columns 'PAGE' and 'PAGE LAYOUT'. The 'PAGE' column has a value 'Building'.

6. (Optional) To begin creating a new page layout using a previous page layout as a starting point, select a page from the **COPY FROM** field.

7. Click **SAVE**.

Editing a Page Layout

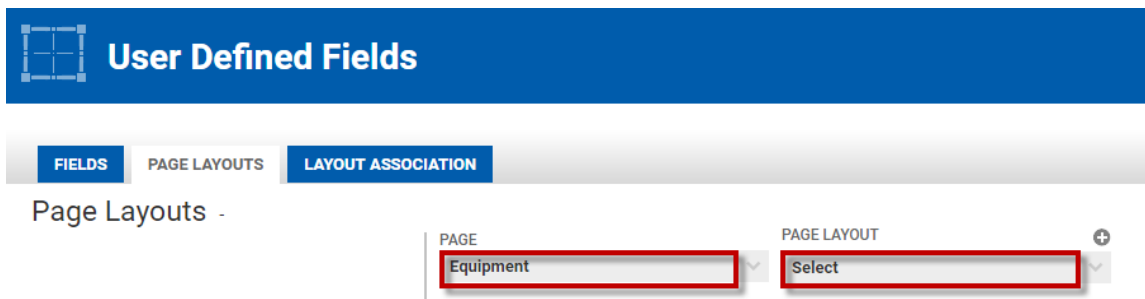
After an equipment or building page layout has been created you can organize your User Defined Fields (UDFs) new or existing into sections.

This section describes the process of editing a page layout.

To edit a page layout:

1. Click **Admin → User Defined Fields**.
2. Click the **PAGE LAYOUTS** tab.

3. Select a **PAGE** and a **PAGE LAYOUT**.



User Defined Fields

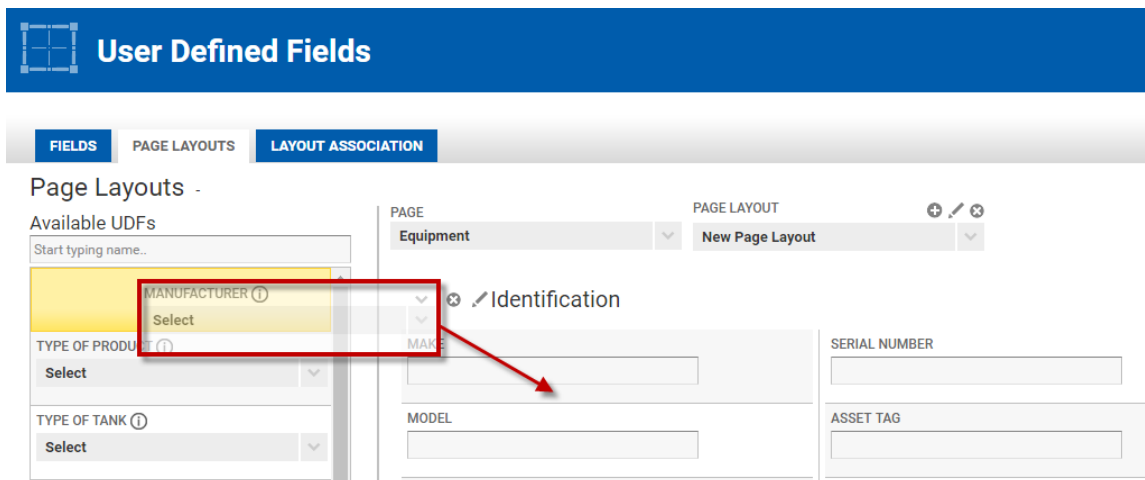
FIELDS **PAGE LAYOUTS** **LAYOUT ASSOCIATION**

Page Layouts -

PAGE: Equipment

PAGE LAYOUT: Select

4. (Optional) To add a User Defined Field (UDF) to a section, left click the UDF from the **Available UDFs** field and perform a drag and drop to the desired section on the right side. Repeat this step until you have added all the UDFs you want to the page.



User Defined Fields

FIELDS **PAGE LAYOUTS** **LAYOUT ASSOCIATION**

Page Layouts -

Available UDFs

Start typing name..

MANUFACTURER ⓘ

Select

TYPE OF PRODUCT ⓘ

Select

TYPE OF TANK ⓘ

Select

PAGE: Equipment


PAGE LAYOUT: New Page Layout

Identification

MODEL

SERIAL NUMBER

ASSET TAG

5. (Optional) **To rearrange fields within a section:** left click the field and perform a drag and drop to the desired section.
6. (Optional) **To edit a section name:** click the  icon located next to the section name.

7. (Optional) **To create another column in a section:** Click the **[+]** located to the right of the section.

8. (Optional) **To delete a column from a section:** Click

9. Once you have finished making your page edits, navigate to the bottom of the page and click **PREVIEW**.
- 10.(Optional) If additional edits are required, click **BACK** and repeats steps 4-9 as necessary.
- 11.Once all edits are completed, click **PUBLISH**.

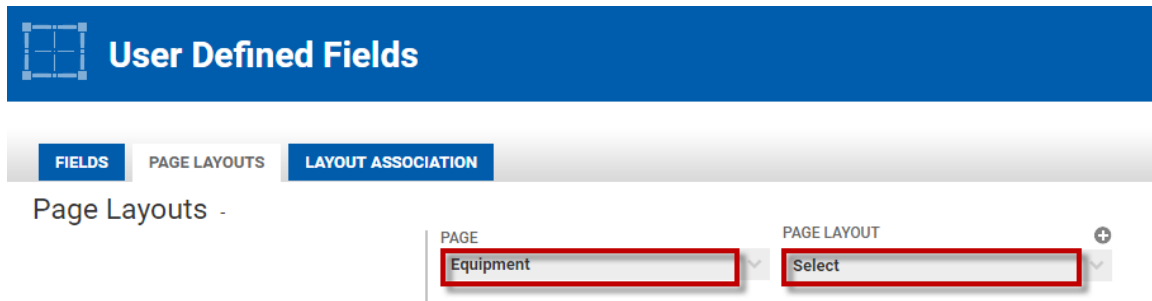
Adding a Section to a Page Layout

This section describes the process of creating another section to a page layout.

To add a section to a page layout:

1. Click **Admin → User Defined Fields**.
2. Click the **PAGE LAYOUTS** tab.

3. Select a **PAGE** and a **PAGE LAYOUT**.



User Defined Fields

FIELDS **PAGE LAYOUTS** **LAYOUT ASSOCIATION**

Page Layouts -

PAGE: Equipment

PAGE LAYOUT: Select

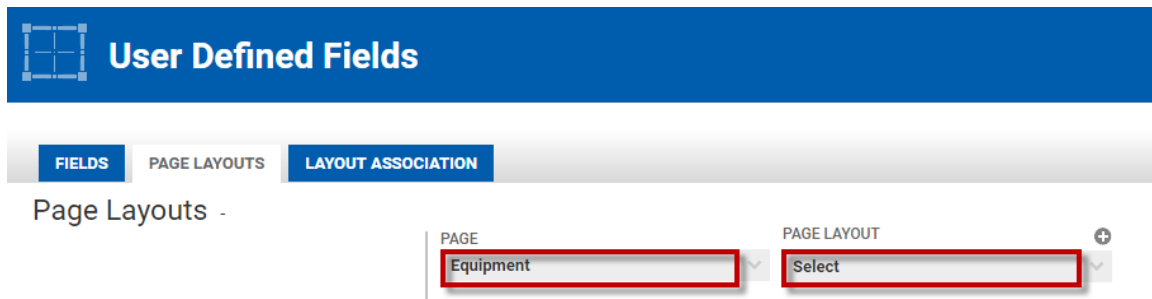
4. Click  **ADD SECTION**.

Deleting a Section from a Page Layout

This section describes the process of deleting a section from a page layout. *Note: Deleting a section ONLY removes the UDF grouping and hides the associated data. Data entered into a UDF is NOT permanently deleted and can be re-accessed when the UDF is added to another section.*

To delete a section to a page layout:

1. Click **Admin → User Defined Fields**.
2. Click the **PAGE LAYOUTS** tab.
3. Select a **PAGE** and a **PAGE LAYOUT**.




User Defined Fields

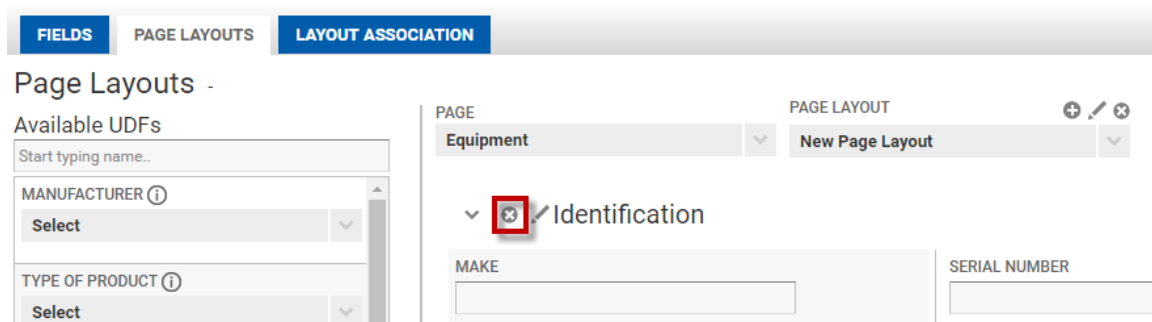
FIELDS **PAGE LAYOUTS** **LAYOUT ASSOCIATION**

Page Layouts -

PAGE: Equipment

PAGE LAYOUT: Select

4. Click the  which corresponds with the section you want to delete from the page.



User Defined Fields

FIELDS **PAGE LAYOUTS** **LAYOUT ASSOCIATION**

Page Layouts -

Available UDFs

Start typing name..

MANUFACTURER ⓘ

Select

TYPE OF PRODUCT ⓘ

Select

PAGE: Equipment

PAGE LAYOUT: New Page Layout

Identification

MAKE

SERIAL NUMBER

Associating a Page Layout to an Equipment Category

After creating the User Defined Fields (UDFs) and page layouts you need to associate each of your page layouts to an Equipment category.

This section describes the process of associating an Equipment page layout to an Equipment category.

To associate a page layout to an Equipment category:

1. Click **Admin → User Defined Fields**.
2. Click the **LAYOUT ASSOCIATION** tab.
3. Using the **PAGE** field, select **Equipment**.
4. Using the **PAGE LAYOUT** field, select the page layout you want to associate to equipment categories.
5. Click the **EQUIPMENT CATEGORIES** that are associated to the page layout.
6. After all of the equipment categories have been selected, click **>**.

User Defined Fields

FIELDS **PAGE LAYOUTS** **LAYOUT ASSOCIATION**

Layout Association - Danielle Danielle Danielle

PAGE
Equipment

PAGE LAYOUT
HVAC Unit

EQUIPMENT CATEGORIES

Begin Typing

Unassociated Items

- Building Equipment
- ELEVATORS
- Electrical
- Elevators, Escalators, & Lifts
- Fire, Life, & Safety
- Gas Generator
- HVAC
- HVAC - Air Compressors
- HVAC - Air Handling Equipment
- HVAC - Boilers
- HVAC - Cabinet/Unit Heaters
- HVAC - Chillers
- HVAC - Cold Boxes
- HVAC - Cooling Towers
- HVAC - Exhaust Fans
- HVAC - Pumps

ITEMS ASSOCIATED TO HVAC UNIT

Begin Typing

SAVE

7. Click **SAVE**.
8. Repeat steps 3-7 until all pages layouts have been associated to equipment categories.

Associating the Page Layout to Building Pages

This section describes the process of associating the Building page layout to all your Building pages. Unlike the Equipment page layout, there is only one Building page layout for all buildings in your portfolio.

To associate the page layout to your Building pages:

1. Click **Admin → User Defined Fields**.
2. Click the **LAYOUT ASSOCIATION** tab.
3. Using the **PAGE** field, select **Building**.
4. Using the **CURRENT PAGE LAYOUT** field, select the page layout you want to associate to your Building pages.

The screenshot shows the 'User Defined Fields' interface. At the top, there's a navigation bar with 'GO TO ADMIN', a search bar 'Search for a building', and a 'Support' link. Below this is a blue header with the 'User Defined Fields' title. Underneath, there are three tabs: 'FIELDS', 'PAGE LAYOUTS', and 'LAYOUT ASSOCIATION'. The 'LAYOUT ASSOCIATION' tab is active. Below the tabs, the text 'Layout Association' is followed by a description: 'Select which custom page layout should be honored for Equipment and Building profiles.' There are two dropdown menus: 'PAGE' with 'Building' selected, and 'CURRENT PAGE LAYOUT' with 'New Layout' selected. A blue 'SAVE' button is located at the bottom right of the form.

5. Click **SAVE**.