Work Order User Guide

Managing and processing work orders

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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.

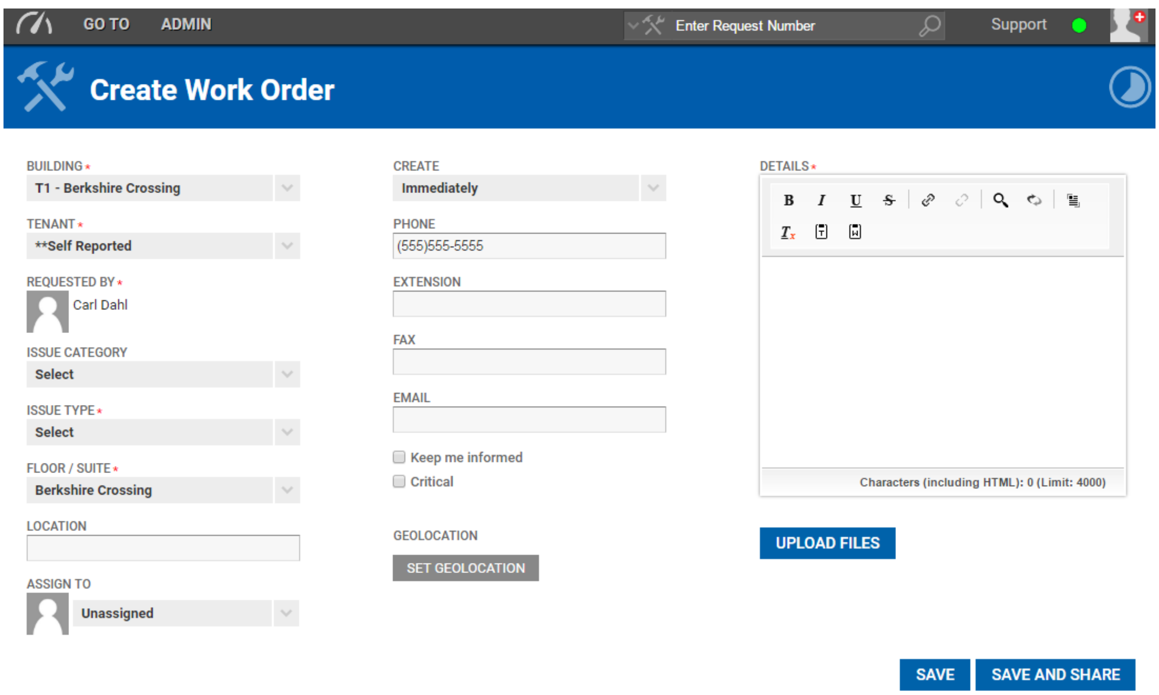
This user guide describes the process of creating a work order from the desktop version of the Building Engines application.

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



3. (Optional) Enter a specific **LOCATION** and assignee.
4. (Optional) Click **Keep me informed** to be notified when updates are made to the work order.
5. (Optional) Click **Critical** to mark the work order as critical on the work order search grid and to change the header color to red.
6. (Optional) Associating a geolocation to a work order can help mobile users locate a work order created in a large open area such as a parking lot or rooftop. To associate a set of geolocation coordinates to a work order:

a. Click SET GEOLOCATION.

b. Using the **GEOLOCATION** map, move the crosshairs over the exact location of the problem and click SET GEOLOCATION.

c. Click **SAVE**.

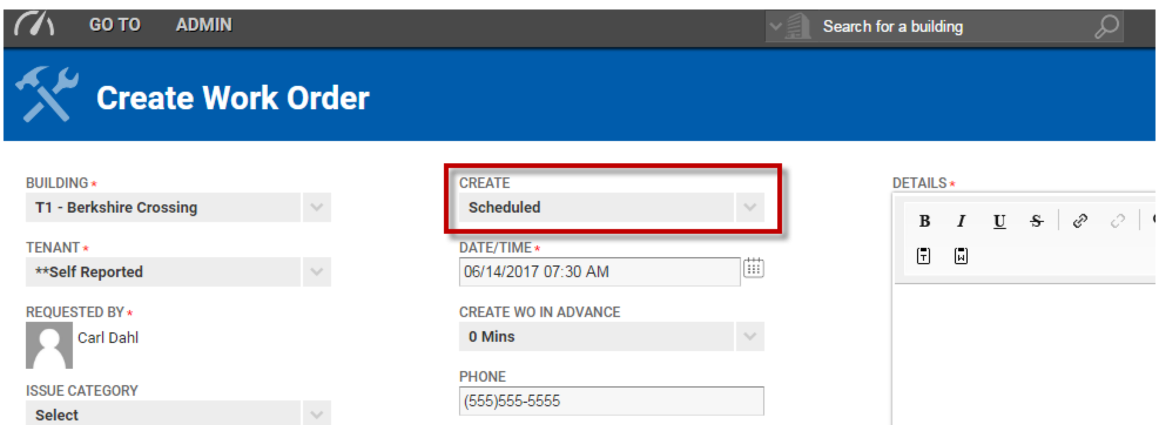
7. Enter the **DETAILS** of the work order.
8. Click **SAVE** or **SAVE AND SHARE** to save and email a PDF of the work order.

Creating a Scheduled Work Order

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

To create a scheduled work order:

1. Click **Go To > Work Orders > Create Work Order**.
2. Select a **BUILDING**, **TENANT**, **ISSUE TYPE**, and **FLOOR / SUITE**.
3. (Optional) Enter a specific **LOCATION** and **ASSIGN TO**.
4. Using the **CREATE** field, select **Scheduled**.



5. Click the icon and select the **DATE / TIME** that the work order is to be created.
6. (Optional) To provide the assignee up to an hour of advanced notice of the work order, select a **CREATE WO IN ADVANCE** time.
7. (Optional) Click **Keep me informed** to be notified when updates are made to the work order.
8. (Optional) Click **Critical** to mark the work order as critical on the work order search grid and to change the header color to red.

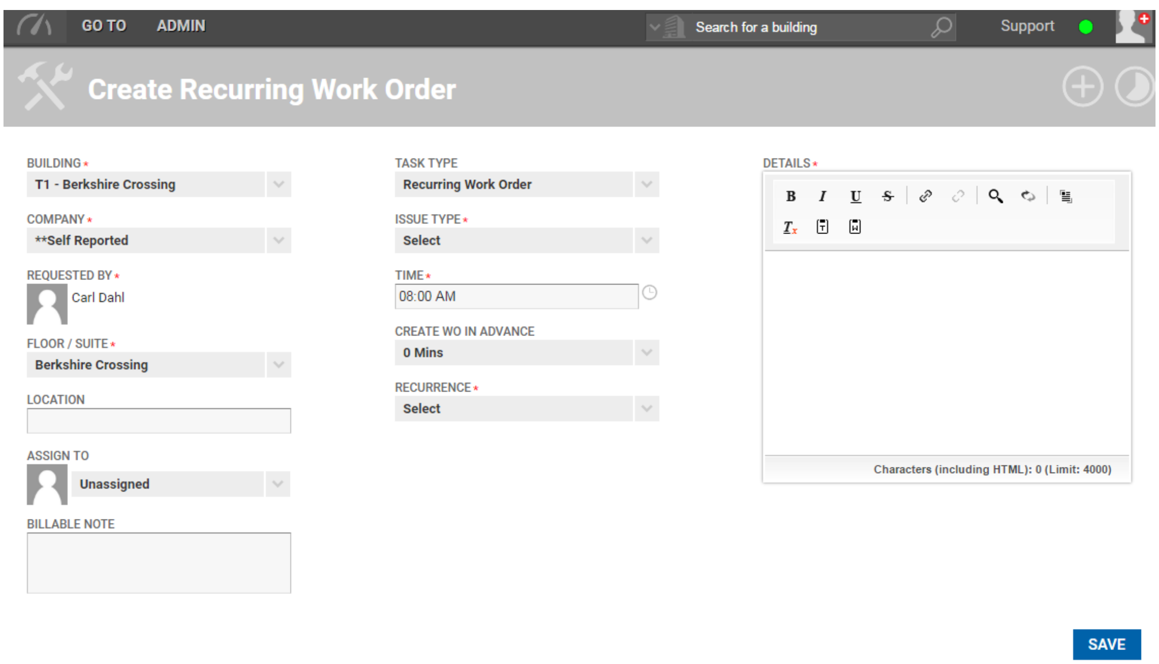
9. (Optional) Associating a geolocation to a work order can help mobile users locate a work order created in a large open area such as a parking lot or rooftop. To associate a set of geolocation coordinates to a work order:
   a. Click SET GEOLOCATION.
   b. Using the **GEOLOCATION** map, click SET GEOLOCATION when the crosshairs are over the exact location of the problem being reported.
   c. Click **SAVE**.
10. Enter the **DETAILS** of the work order.
11. Click **SAVE.**

Creating a Recurring Work Order

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

To create a recurring work order:

1. Click **Go To > Work Orders > Create Recur**. **Work Order**.
2. Select a **BUILDING**, **COMPANY**, **FLOOR / SUITE**, and **ISSUE TYPE**.



3. Confirm that 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.

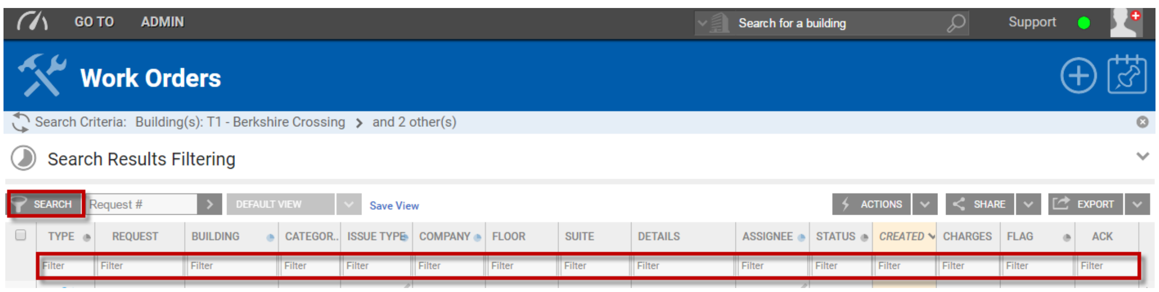
6. (Optional) Select a **CREATE WO IN ADVANCE** time to give the assignee advance notice.
7. Enter the frequency in the **RECURRENCE** field.
8. (Optional) Enter work order **DETAILS**.
9. Click **SAVE**.

Searching for an Existing Work Order

You can search for existing work orders using the work order search filters or by the work order number. This section describes the process of searching for an existing work order using search filters and the request number.

To search for an existing work order using the search filters:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters.



3. Enter your search parameters into the work order filters and click **SEARCH**.

To search for an existing work order by work order number:

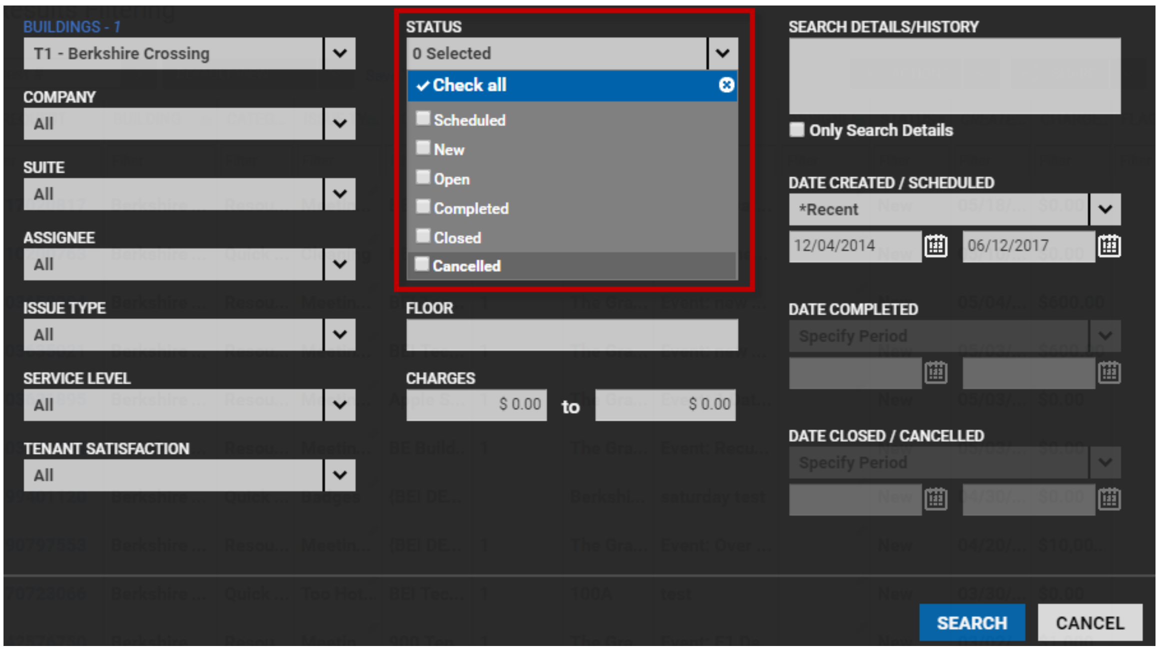
1. Navigate to the Universal Building and Task Search.
2. Select the Work Order icon, enter a valid work order number, and click the  icon.

Searching for a Scheduled Work Order

You can search scheduled work orders using the work order search filter. This section describes the process of searching for a scheduled work order.

To search for a scheduled work order:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Click **SEARCH**.
3. Using the **STATUS** field, select **Scheduled**.



4. Enter your search parameters and click **SEARCH**.

Searching for a Cancelled Work Order

Cancelled work orders can be found using the work order search filters. This section describes the process of searching for a cancelled work order.

To search for a cancelled work order:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Click **SEARCH**.
3. Using the **STATUS** field, select **Cancelled**.
4. Enter relevant search parameters and click **SEARCH**.

Searching for a Recurring Work Order

Separate from regular and scheduled work orders, recurring work orders have their own dedicated dashboard. This section describes the process of searching for a recurring work order.

To search for a recurring work order:

1. Click **Go To > Work Order > Recurring Work Order Dashboard**.
2. Click **SEARCH** and use the fields to enter your search parameters.
3. Click **SEARCH** to execute a search.

Editing a Work Order

Following the creation of a work order, and if you have the necessary permissions, you have the ability to edit the original work order details. This section describes the process of editing an existing work order.

To edit a work order:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Orders** grid, click the **REQUEST** number hyperlink.
4. Click **Edit Details** and use the fields to edit the work order.
5. Click **SAVE**.

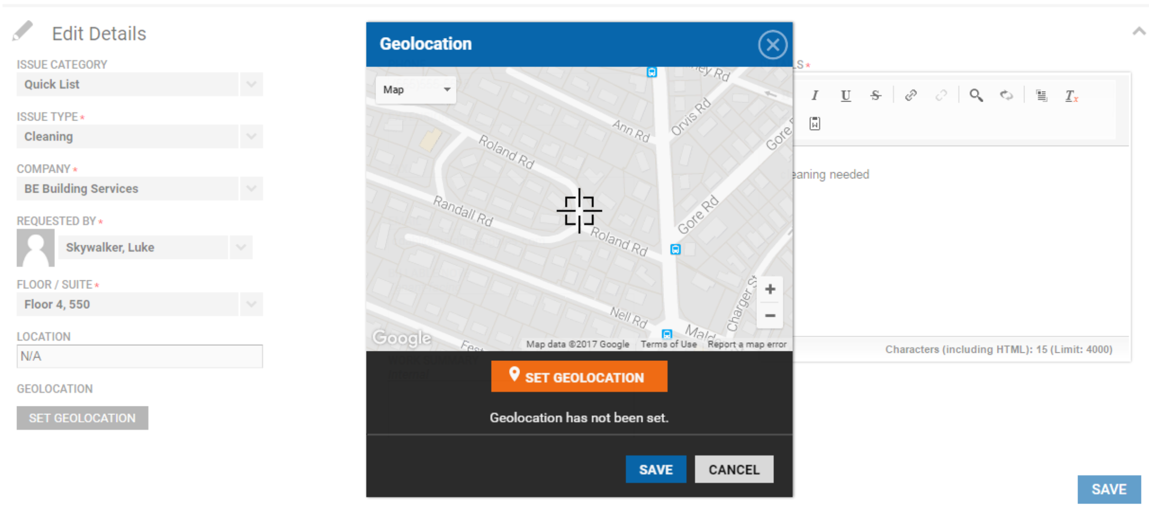
Associating a Geolocation to a Work Order

Gelocation coordinates can be added to a work order at the time of creation or after the work order has been opened. Associating a geolocation to a work order can help mobile users locate a work order created in a large open area such as a parking lot or rooftop. This section describes the process of associating a geolocation to an existing work order.

To associate a set of geolocation coordinates to an existing work order:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Orders** grid, click the **REQUEST** number hyperlink.
4. Click the **Edit Details** section to expand.
5. Scroll down and click SET GEOLOCATION.

6. Using the **GEOLOCATION** map, move the crosshairs over the exact location of the problem and click SET GEOLOCATION.



7. Click **SAVE**.

Removing a Gelocation from a Work Order

If a geolocation was incorrectly associated to a work order it can be cleared and re-associated with a new set of geolocation coordinates. This section describes the process of removing the geolocation coordinates from a work order.

To remove the geolocation coordinates from a work order:

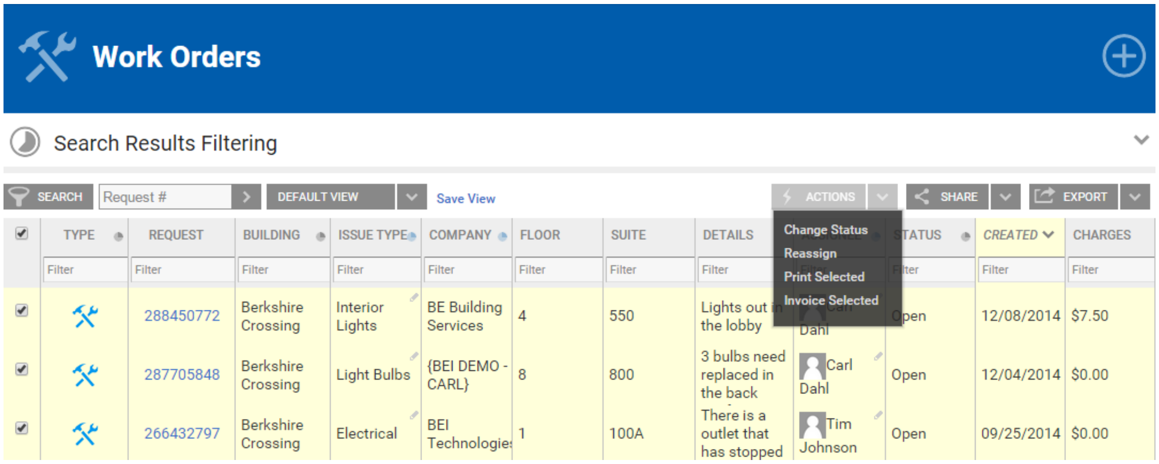
1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Orders** grid, click the **REQUEST** number hyperlink.
4. Click the **Edit Details** section to expand.
5. Scroll down the the geolocation map and click CLEAR.
6. 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 grid:

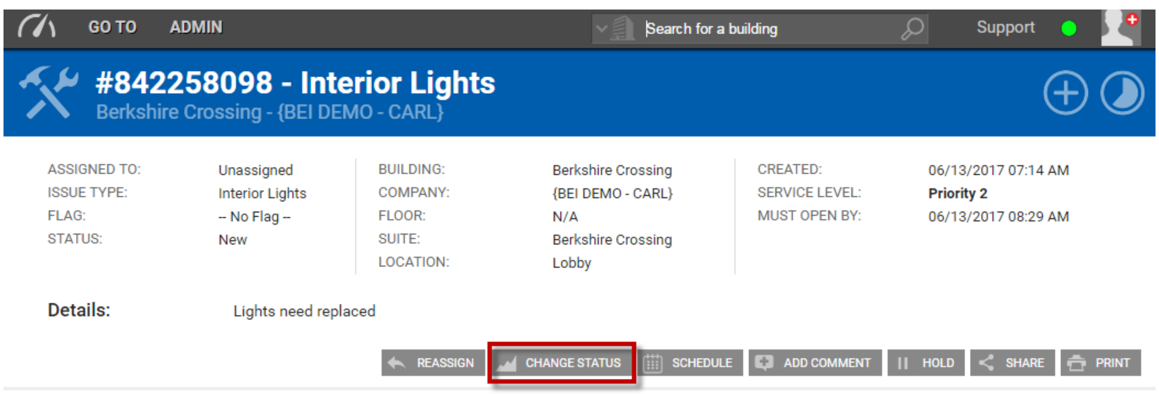
1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Select the work orders you want to update.
3. Click the **ACTIONS** dropdown and select **Change Status**.



4. Select a work order **STATUS**, add an optional comment, and click **SAVE**.

To change the status from within the work order:

1. Click **CHANGE STATUS**.



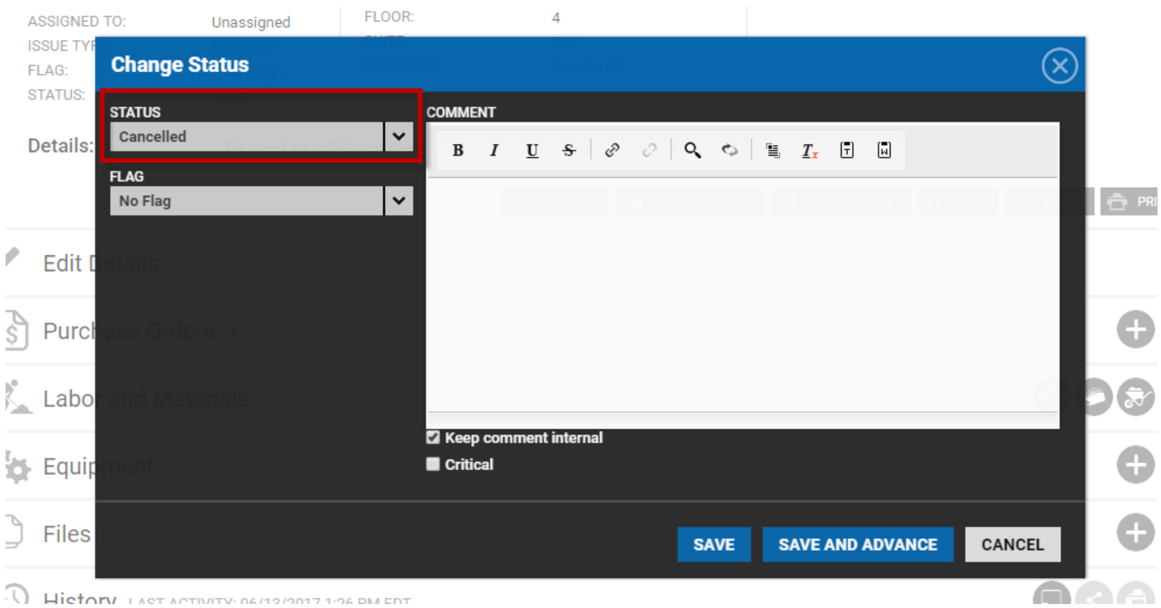
2. Select a work order **STATUS**, add an optional comment, and click **SAVE**.

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:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Orders** grid, click the **REQUEST** number hyperlink.
4. Click **CHANGE STATUS**.
5. From the **STATUS** dropdown, select **Cancelled**.



6. 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 Oder Dashboard.

To cancel a recurring work order:

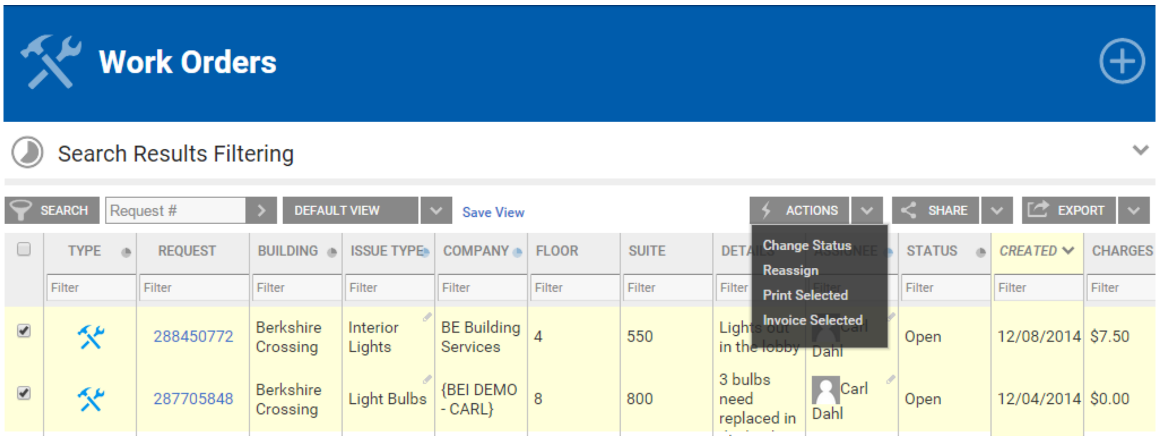
1. Click **Go To > Work Orders > Recurring Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the recurring work order.
3. From the **Recurring Work Orders** grid, select a recurring work order.
4. Click **DELETE**, and then confirm by clicking **OK**.

Reassigning a Work Order

This section describes the process of reassigning a work order from the Work Order grid and from within the work order.

To reassign from the Work Orders grid:

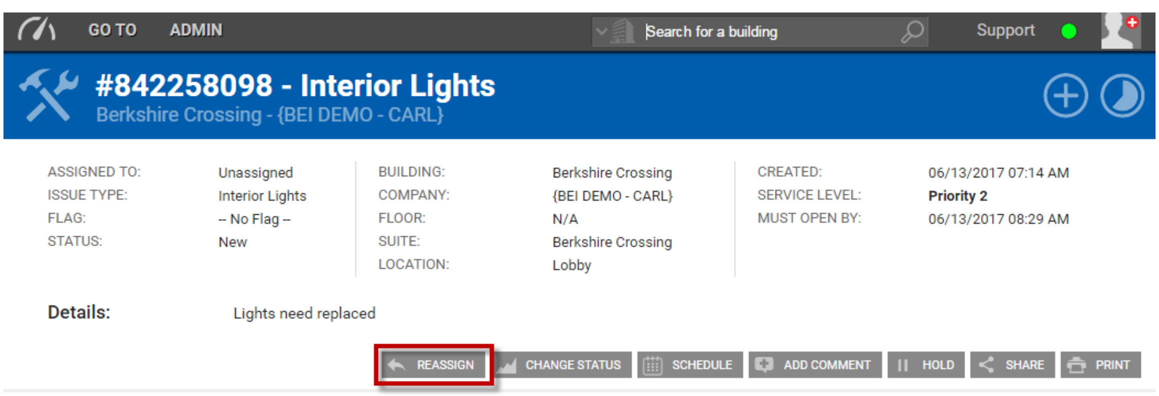
1. Select the work orders you want to reassign using the check boxes located to the left of the work order(s).
2. Click the **ACTIONS** dropdown and select **Reassign**.



3. Select an assignee, notification method, and enter a message if applicable.
4. Click **SAVE**.

To reassign from within the work order:

1. Click **REASSIGN**.



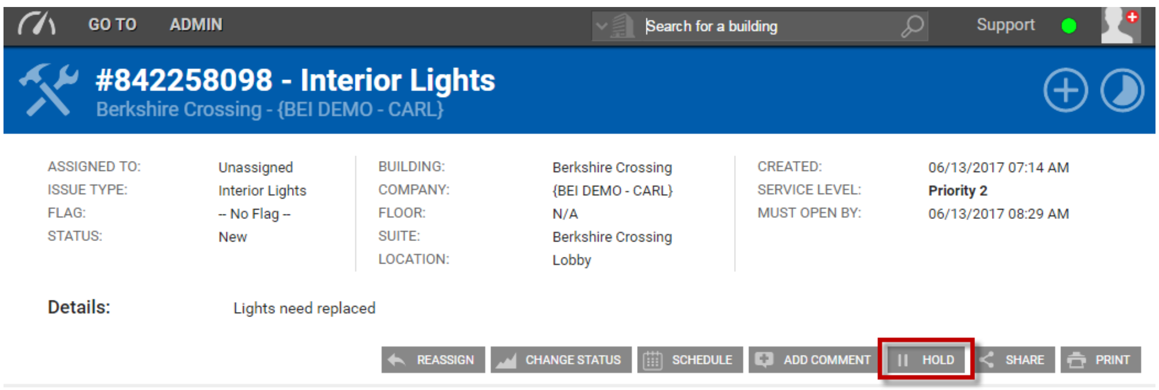
2. Select an assignee, notification method, message preferences, and enter a message if applicable.
3. Click **SAVE**.

Placing a Work Order On Hold

Placing a work order on hold pauses the service level agreement clock. This prevents the work order from entering an overdue status and potentially sending out escalation alerts. This section describes the process of placing a work order on hold.

To place a work order on hold:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Order** grid, click the **REQUEST** number hyperlink.
4. Click **HOLD**.



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

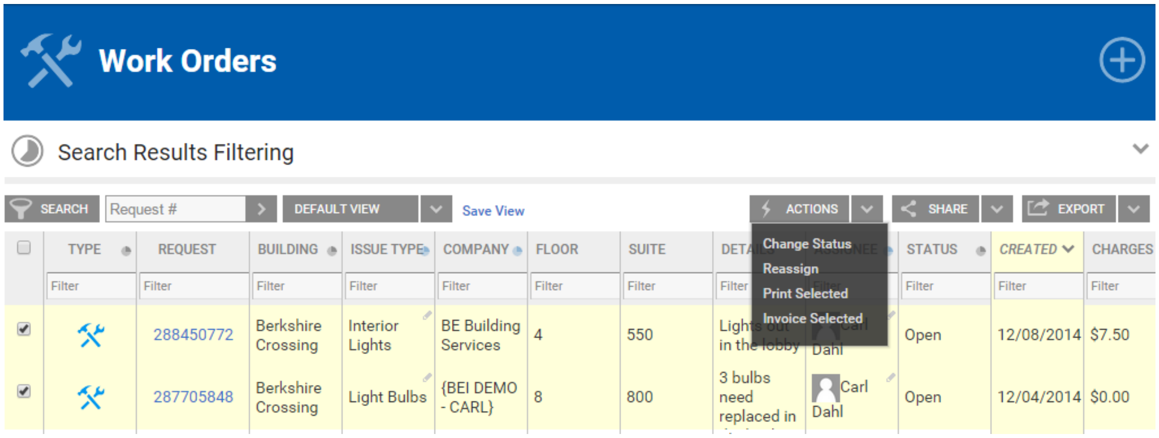
Printing a Work Order

This section describes the process of printing a work order from the Work Orders grid and from within the work order.

To print a work order from the Work Orders page:

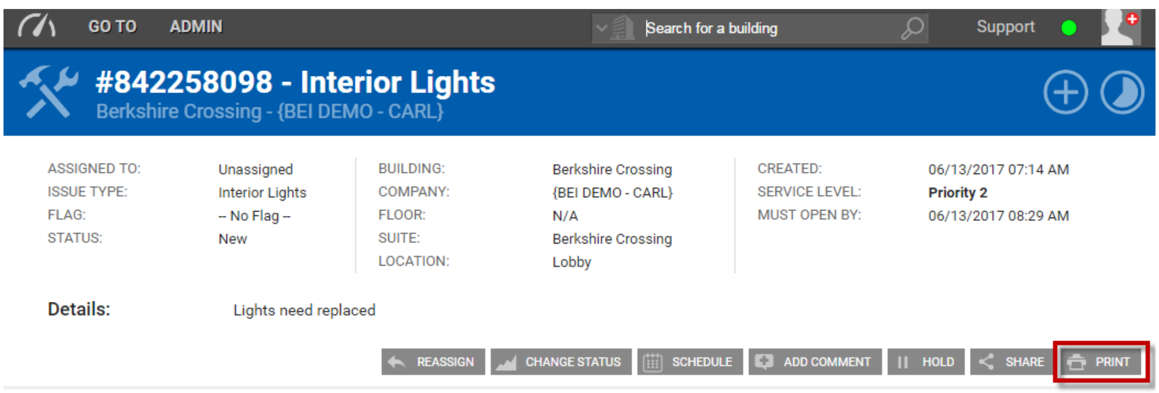
1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Select the work orders you want to print using the check boxes located to the left of the work order(s).

3. Click the **ACTIONS** dropdown and select **Print Selected**.



To print from within the work order:

1. Navigate to the top section of the work order.
2. Click **PRINT**.



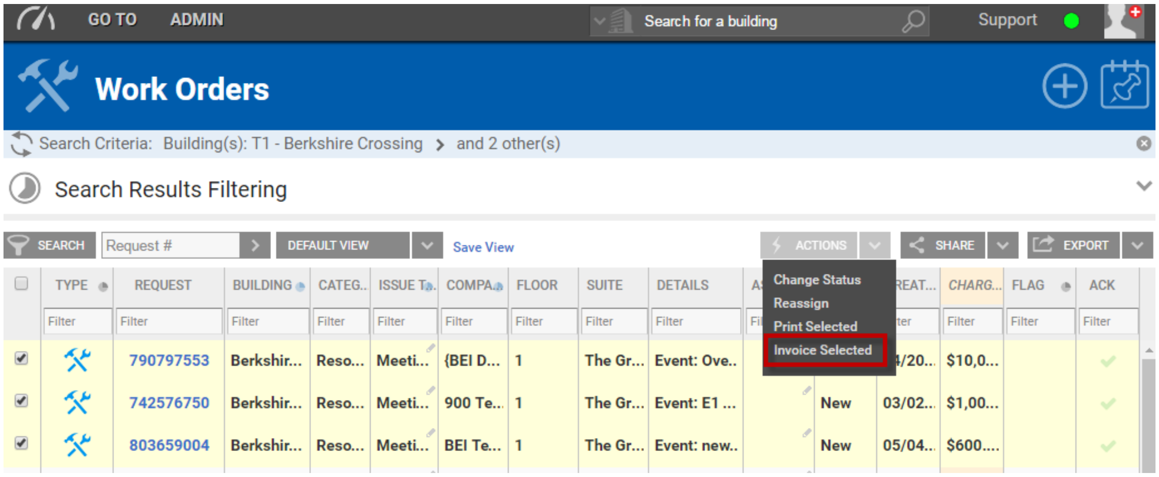
Printing an Invoice

This section describes the process of printing an invoice from the Work Orders grid and from within the work order.

To print a work order from the Work Orders page:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Select the work orders you want to print using the check boxes located to the left of the work order(s).

3. Click the **ACTIONS** dropdown and select **Invoice Selected**.



To print an invoice from within a work order:

1. Navigate to the **Labor and Materials** section.
2. Click the **Print Invoice** icon.

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

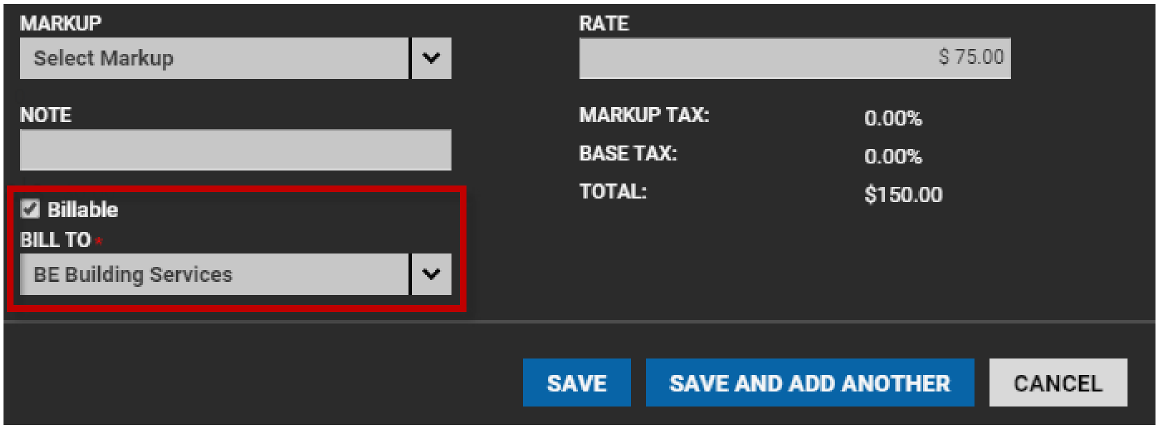
If configured, Split Billing allows you to add charges, and invoice multiple entities, from within a single work order.

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.

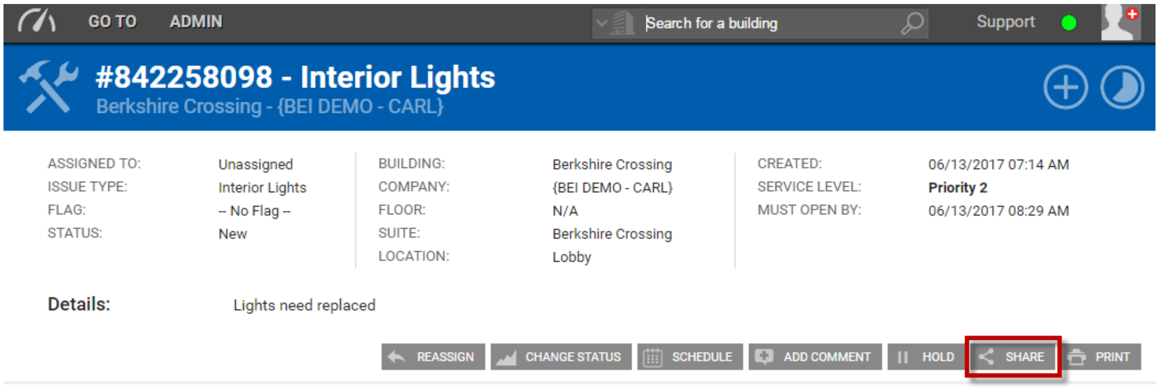
Sharing a Work Order

Sharing allows you to create and email a PDF of the work order. This section describes the process of sharing a work order.

To share a work order:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.

3. From the **Work Order** grid, click the **REQUEST** number hyperlink.
4. Click **SHARE**.



5. 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.
6. Select the recipients by clicking the **(+)** next to their name, or by manually adding their email into the **email address** field.
7. Click **Send**.

Linking a Work Order to a Piece of Equipment

If you are able to determine that a faulty piece of equipment is the reason for a work order, you can link the work order back to the piece of equipment. This section describes the process of linking a work order to a piece of equipment.

To link a work order to a piece of equipment:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Order** grid, click the **REQUEST** number hyperlink.
4. Scroll down to the **Equipment** section and click ⊕.

5. Enter the name, serial number, or asset tag of the piece of equipment. As you type, the system auto-suggests possible equipment matches.

6. Using the **Problem** field, enter the reason for linking the work order to a piece of equipment.
7. 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

At any point during the lifecycle of a work order a file can be attached. Files can be in the form of PDFs, Word files, photos, and the like. This section describes how to add an electronic file or photo to the work order.

To add a file:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Order** grid, click the **REQUEST** number hyperlink.
4. Scroll down to the **Files** section and click .

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

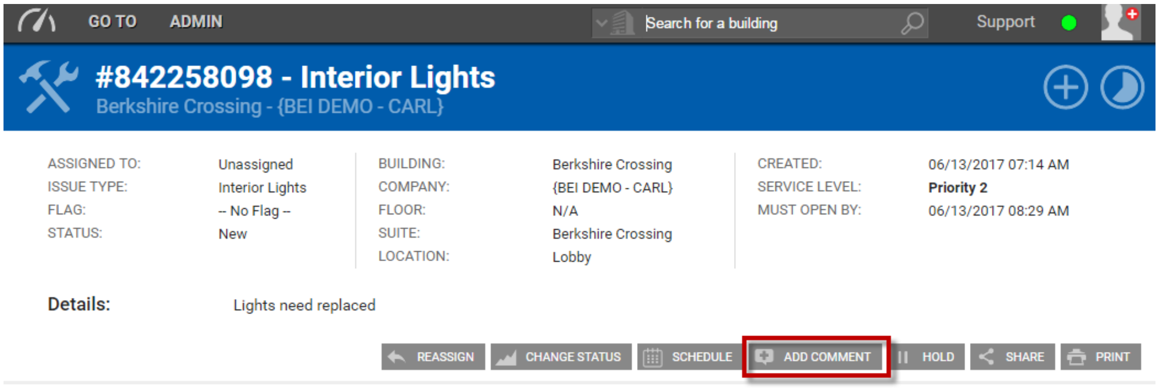
Adding a Comment to a Work Order

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

To add a comment to a work order:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Order** grid, click the **REQUEST** number hyperlink.

4. Click **ADD COMMENT**.



5. Enter your comment into the **Add Comment** box.
6. (Optional) Click **Keep Comment Internal** to hide the comment from the tenant interface.
7. Click **SAVE**.

Adding Labor to a Work Order

Labor can be added to a work order to track the time spent on the issue or to bill back tenants after services have been provided. This section describes how to add labor to a work order.

To add labor to a work order:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Order** grid, click the **REQUEST** number hyperlink.
4. 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.
5. Click **SAVE** to add the labor or **SAVE AND ADD ANOTHER** to enter in additional charges.

Adding Materials to a Work Order

Materials can be added to a work order to track material spent on the issue or to bill back tenants after the work order has been completed. This section describes how to add material to a work order.

To add a material to a work order:

1. Click **Go To > Work Orders > Work Order Dashboard**.
2. Use the **SEARCH** and/or column filters to locate the work order.
3. From the **Work Order** grid, click the **REQUEST** number hyperlink.
4. 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.
5. Click **SAVE** to add the material or **SAVE AND ADD ANOTHER** to enter in additional charges.