



QR Code User Guide



Implementing and managing QR Codes into your operations workflow

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QR Codes

A QR code is a machine-readable optical label that contains information about the item to which it is attached. With respect to the Building Engines web and mobile based platforms, QR Codes can be assigned to equipment and locations and integrated into the Work Order, Preventive Maintenance, and Inspections modules.

This user guide describes QR Code functionality in the Work Order, Preventive Maintenance, and Inspections modules.

QR Codes in Work Order Workflow

Integrating QR Codes into your Work Order workflow allows your Engineers to quickly create new work orders, as well as view all associated work orders, for that specific location. This section describes the process of assigning a QR Code to a location, as well as creating and viewing associated work orders.

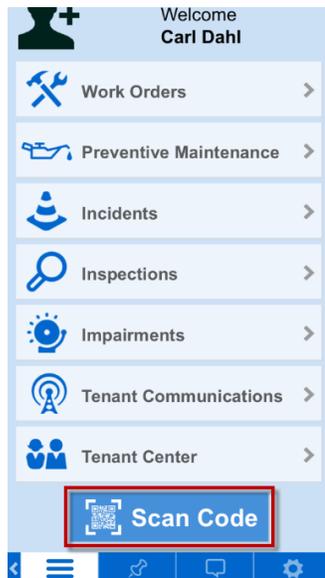
Assigning a QR Code to a Location Record

QR Codes can be associated to floors, suites, and in-office locations. This section describes the process of assigning a QR Code to a location using the Building Engines mobile application.

Note: If you are unable to assign a QR Code to a location, please reach out to your dedicated Client Success Manager for additional system permission.

To assign a QR Code to a location:

1. Navigate to the bottom of the homepage and click **Scan Code**.



2. Use your device's camera to scan the QR Code.

3. Click [Add Code to Location Record](#).

4. Select a **BUILDING**, location type (Floor, Suite, In-Office Location), **FLOOR**, and **SUITE**.
5. Click .

Creating a Work Order from a QR Code

Work orders can be created following a QR Code scan in locations where a QR Code is assigned. This section describes the process of creating a work order for a location assigned to a QR Code scan.

To create a work order for a location assigned to a QR Code:

1. Navigate to the bottom of the homepage and click **Scan Code**.
2. Use your device's camera to scan the QR Code.
3. Click .
4. Select a **BUILDING**.
5. Select a **TENANT** and **CONTACT**.

*Note: If this work order is being proactively reported on behalf of a tenant, select a **TENANT** company and click **Proactive Report**.*

6. (Optional) Select an issue type **CATEGORY**.
7. Select a work order **ISSUE TYPE**.
- Note: Issue type specific form questions appear when a form template accompanies an issue type.*
8. (Optional) Enter the **LOCATION** of the work order.
9. (Optional) Use the **ASSIGN TO** field to select an assignee.
10. Enter the **DETAILS** of the work order.
11. (Optional) To add a photo, click **Add Photo** and select either **Take Camera Photo** or **Add From Gallery**.

- **Take Camera Photo** enables your smartphone's integrated camera.
 - **Add From Gallery** allows you to access a previously taken photo from your smartphone's photo gallery.
- a. (Optional) To draw on the photo, click , select a color, and use your finger or stylus to draw on the photo.
 - b. Click **Use**.
 - c. (Optional) Enter a comment to accompany the photo.

d. Click **Save** or **Add More** to add additional photos.

12. Click **Create New Request**.

Reviewing Work Orders Associated to a QR Code

Work orders associated to a location can be quickly recalled if there is a QR Code assigned to the location. This section describes the process of recalling a location's work orders via an assigned QR Code.

To review a location's work order via an assigned QR Code:

1. Navigate to the bottom of the homepage and click **Scan Code**.
2. Use your device's camera to scan the QR Code.
3. Click **Review location's work orders**.
4. (Optional) Use the search fields to locate a specific work order.
5. (Optional) Click a work order to view the work order.

Unlinking a QR Code from a Location Record (Mobile)

This section describes the process of unlinking a QR Code from a location.

To unlink a QR Code from a location:

1. Navigate to the bottom of the homepage and click **Scan Code**.
2. Use your device's camera to scan the QR Code.
3. Click **Delete Code** and click **OK** to confirm.

QR Codes in Preventive Maintenance

Assigning QR Codes to your preventive maintenance equipment allows your engineers to quickly recall equipment information from the mobile application. This section describes the process of implementing QR Codes into your Preventive Maintenance program.

Assigning a QR Code to an Equipment Record

This section describes the process of assigning a QR Code to a piece of equipment using the Building Engines mobile application.

To assign a QR Code to a piece of equipment:

1. Navigate to the bottom of the homepage and click **Scan Code**.

2. Use your device's camera to scan the QR Code.
3. Click [Add Code to Equipment Record](#).

Recalling Equipment Record Information

Equipment record information, such as make, model, specifications, files, and tasks, can be quickly recalled by scanning a piece of equipment's QR Code. This section describes the process of recalling equipment information from a QR code scan.

To recall equipment information from a QR Code scan:

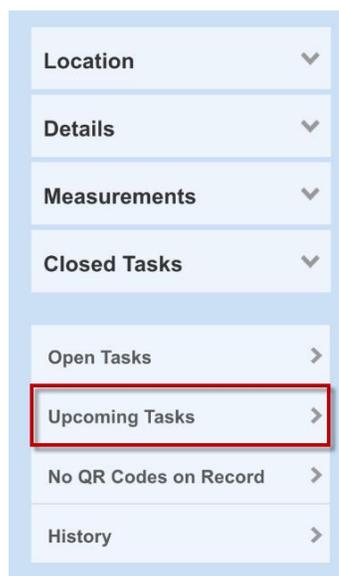
1. Navigate to the bottom of the homepage and click **Scan Code**.
2. Use your device's camera to scan the QR Code.
3. Click the informational section you want to view.

Firing an Upcoming PM Task

PM tasks are configured to automatically fire based upon a predetermined maintenance schedule. If you need to fire a future task prior to its scheduled fire date, you can do so via the mobile application. This section describes the process of firing a future PM task prior to its scheduled date.

To fire a future PM task early:

1. Navigate to the bottom of the homepage and click **Scan Code**.
2. Use your device's camera to scan the QR Code.
3. Scroll down the equipment record and click **Upcoming Tasks**.



4. Select the PM task you want to fire.
5. Click **Fire Now**.

Creating an Unscheduled PM Task

If a piece of equipment requires an unexpected repair you can create an unscheduled task from the equipment record. This section describes the process of creating an unscheduled PM task from a QR Code scan.

To create an unscheduled PM task from a QR Code:

1. Navigate to the bottom of the homepage and click **Scan Code**.
2. Use your device's camera to scan the QR Code.
3. Scroll down the equipment record and click **Open Tasks**.
4. Click **Add Unscheduled Task**.
5. Enter a task **NAME**, select an **ASSIGNEE**, the **DAYS TO COMPLETE**, and optional **NOTES**.

*Note: If the task takes longer to complete then the **DAYS TO COMPLETE** value, the task is considered overdue.*

6. Click **Add Unscheduled Task** to create the task.

Unlinking a QR Code from an Equipment Record

This section describes the process of unlinking a QR Code from an equipment record.

To unlink a QR Code from a piece of equipment:

1. Navigate to the bottom of the homepage and click **Scan Code**.
2. Use your device's camera to scan the QR Code.
3. Scroll down and click **QR Codes**.
4. Select the QR Code to remove and click **Delete Code**.
5. Click **OK** to confirm.

QR Codes in Inspections

QR Codes assigned to locations can be an optional or required component of a Dynamic, Building, and/or Tenant inspection. Implementing a QR Code scan into an inspection ensures that any required spaces are inspected in-person. This section describe the process of implementing QR Codes into your Inspections workflow.

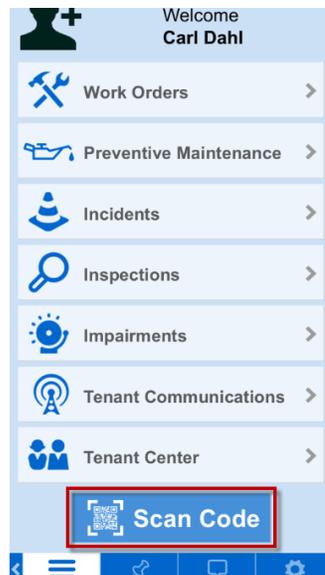
Assigning a QR Code to a Location Record

QR Codes can be associated to floors, suites, and in-office locations. This section describes the process of assigning a QR Code to a location using the Building Engines mobile application.

Note: If you are unable to assign a QR Code to a location, please reach out to your dedicated Client Relationship Manager for additional system permission.

To assign a QR Code to a location:

1. Navigate to the bottom of the homepage and click **Scan Code**.



2. Use your device's camera to scan the QR Code.

3. Click [Add Code to Location Record](#).
4. Select a **BUILDING**, location type (Floor, Suite, In-Office Location), **FLOOR**, and **SUITE**.
5. Click [Add This Code to Location Record](#).

Scanning a QR Code for an Inspection

Inspections, such as “daily rounds”, may require an in-person scan of a QR Code. This section describes the process of scanning a QR Code when a scan response question is presented in an inspection.

To scan a QR Code within an inspection:

1. Navigate to the Scan Code response question.
2. Click [Scan Location Code](#).
3. Use your device’s camera to scan the QR Code. Following the scan, the equipment building, floor, and suite are saved as a response to the question.

Web Facing QR Codes

QR Code functionality is primarily used on the mobile application, however, there is some limited, and necessary, functionality on the web side of the application as well. This section describes how to create a scanned response inspection question, along with manually assigning a QR code to a location and/or equipment record.

Creating a QR Scan Inspection Question

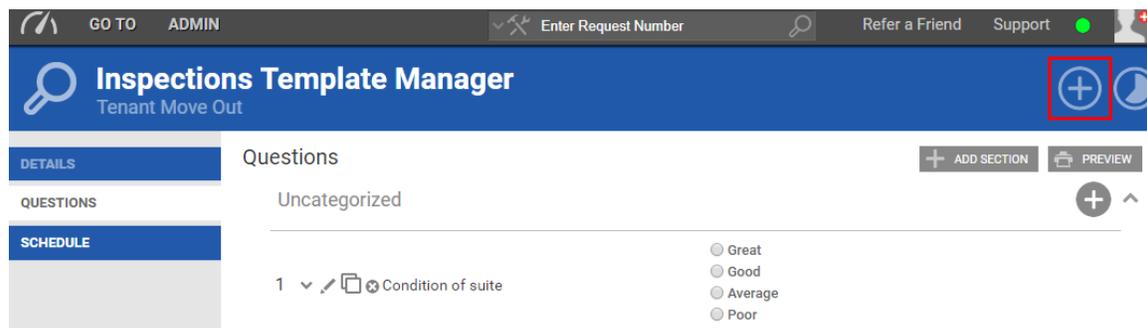
Before QR Codes can be implemented into an inspection, a scanned response type of question must be added to an inspection template. This section describes the process of adding a scanned response inspection question to an inspection template.

*Note: For additional information on the Inspections module, please see the **Inspections User Guide**.*

To add a scanned response question to an inspection template:

1. Click **GO TO > Inspections > Inspections Template Manager**.
2. Select an inspection template from the list and click **EDIT TEMPLATE**.

3. On the left side of the page, click **QUESTIONS**.
4. Click **(+)** to add a new question.



5. Select the **Scan Response Input** type of question.
6. Enter your question via the **ENTER YOUR QUESTION** field.
7. (Optional) Click **Require Response** to make the question mandatory.
8. Click **SAVE**.
9. On the left side of the page, click **SCHEDULE** to finish your inspection setup and activate the inspection.

*Note: For complete set of Inspection activation steps, see the **Inspections User Guide**.*

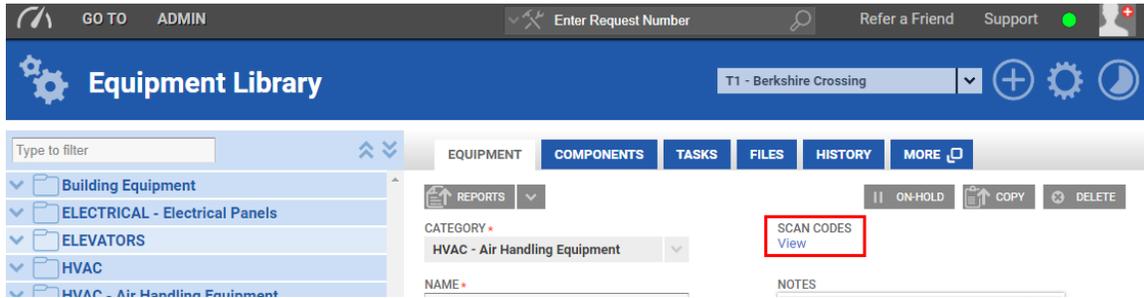
Manually Assigning a QR Code to a Piece of Equipment

In most cases, QR Codes are assigned to a piece of equipment via a mobile device and the mobile application, however, the QR Code can also be assigned manually via the web application. This section describes the process of assigning a QR Code to a piece of equipment.

To manually assign a QR Code to a piece of equipment:

1. Click **GO TO > Preventive Maintenance > Equipment Search**.
2. Use the **SEARCH** and/or column filters to locate the piece of equipment.
3. Click the equipment **NAME**.

- Under **SCAN CODES**, click **View**.



- Click **(+)** to add a new scan code.
- Using the **SCAN CODE** field, enter the QR Code.
- Click **SAVE**.

Unlinking a QR Code from a Location

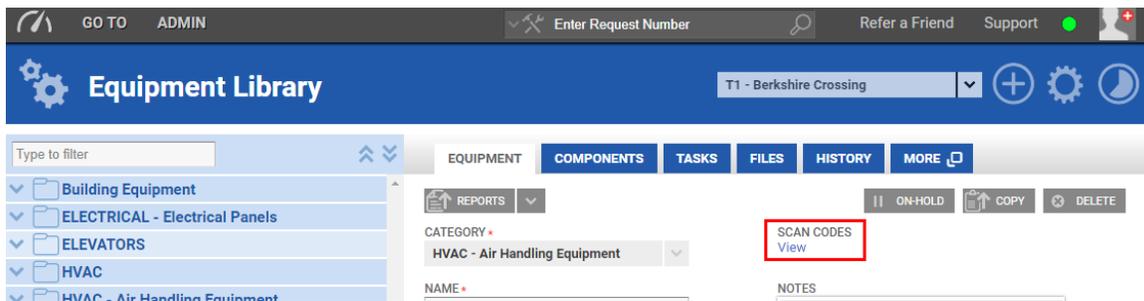
Locational QR Codes can only be unlinked from the mobile application. If you need to unlink a QR Code from a location, see the section labeled **Unlinking a QR Code from a Location**.

Unlinking a QR Code from a Piece of Equipment

This section describes the process of unlinking a QR Code from a piece of equipment from the web version of the Building Engines application.

To unlink a QR Code from a piece of equipment:

- Click **GO TO > Preventive Maintenance > Equipment Search**.
- Use the **SEARCH** and/or column filters to locate the piece of equipment.
- Click the equipment **NAME**.
- Under **SCAN CODES**, click **View**.



- Select the QR Code you want to unlink and click **(X)**.