



Access Card Manager User Guide



Managing, approving, and cancelling tenant employee access card requests

Table of Contents

Overview	3
Access Card Manager.....	3
<i>Creating a New Access Card Request</i>	3
<i>Completing an Access Card Request</i>	4
<i>Reissuing an Access Card</i>	4
<i>Canceling an Access Card</i>	5
<i>Updating an Access Card Number</i>	6
<i>Sharing a List of Access Cards</i>	7
<i>Exporting a List of Access Cards</i>	7

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Overview

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.

Access Card Manager

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.

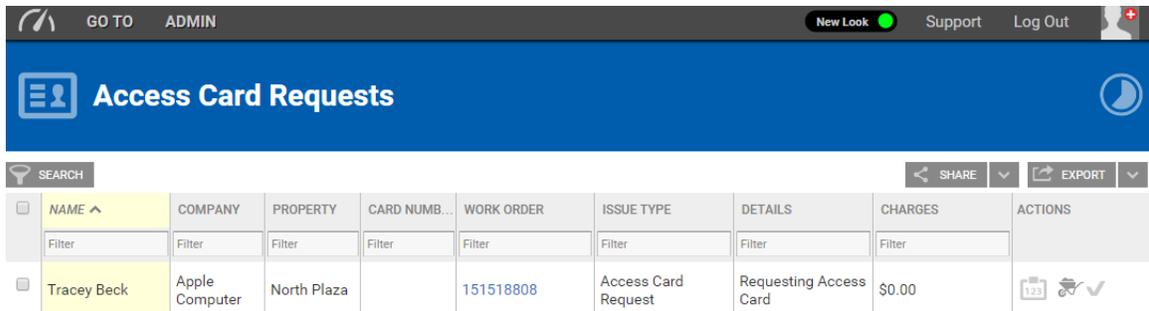
PROPERTY	ACCESS CARD #	REQUEST #	ACTION
North Plaza		#151518808 - Pending	Request Pending

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.

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

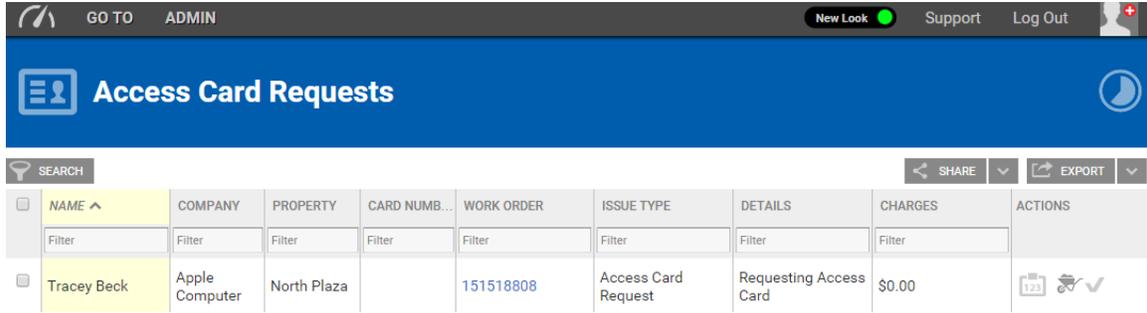
This section describes how to cancel and access card request.

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:

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.



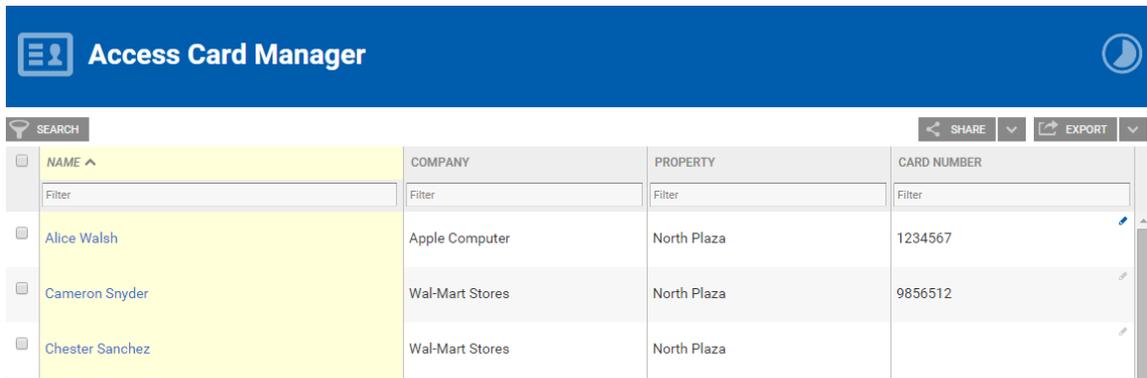
NAME ^	COMPANY	PROPERTY	CARD NUMB...	WORK ORDER	ISSUE TYPE	DETAILS	CHARGES	ACTIONS
Tracey Beck	Apple Computer	North Plaza		151518808	Access Card Request	Requesting Access Card	\$0.00	  

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
Alice Walsh	Apple Computer	North Plaza	1234567
Cameron Snyder	Wal-Mart Stores	North Plaza	9856512
Chester Sanchez	Wal-Mart Stores	North Plaza	

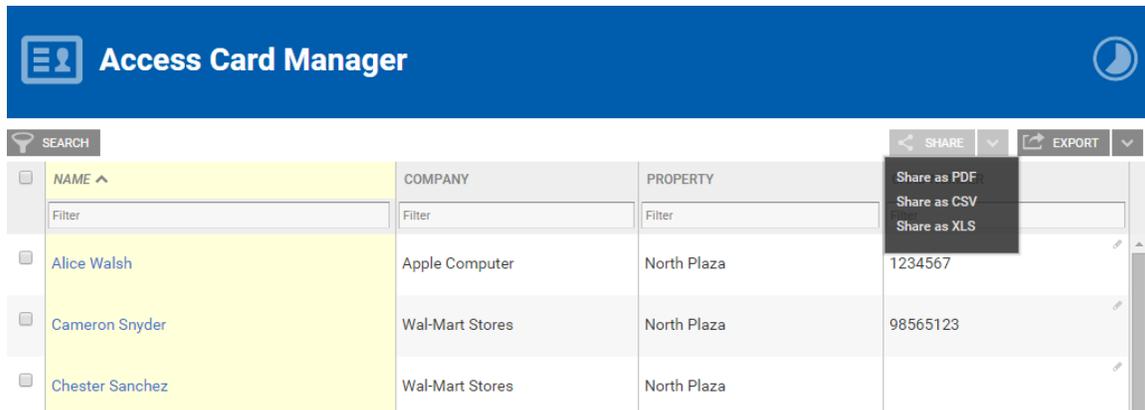
3. Click the  icon in the **CARD NUMBER** column, enter in the new number, and navigate away from the **CARD NUMBER** field. The application automatically saves the new access card number.

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.