

## Building Engines Dispatch QuickStart Guide

Task Dispatch provides an easy way for dispatchers and managers to quickly assign work to the best person and manage team workloads

### Visually View and Manage Work Orders

Simply drag and drop tasks to the best resource

### Smart Assignments

Quickly see who is working now or starting soon

### Workload Balancing

Compare employee workloads, reassign as needed

The screenshot displays the Task Dispatch interface. At the top, there is a navigation bar with 'GO TO ADMIN', a search bar for buildings, and a 'Support' link. Below this is a blue header with the 'Task Dispatch' logo and a filter dropdown set to 'All'. The main content area is divided into two sections. On the left, 'Unassigned Tasks' are listed in a column of tiles, including 'Leak/Plumbing', 'Cleaning', 'Engineering Request', and 'Too Hot'. On the right, tasks are assigned to employees: Charlie Coordinator (07:00 AM - 04:00 PM), Eddie Engineer (08:00 AM - 05:00 PM), Freddy Fixit (01:00 PM - 09:00 PM), and Molly Manager (08:30 AM - 06:30 PM). Each employee's row shows a list of assigned tasks with their details, such as location, priority, and timestamp.

## Features at-a-Glance

Unassigned tasks are displayed in “tiles” in a column on the left, with the newest tasks on the top. A list of assignable employees are displayed on the right. Work order tasks that are already assigned to the engineer are displayed as a list of tiles in a row under the engineer’s name.

### Assign a task

Start by clicking on a task that you want to assign. You will see the color of the task tile change so that you know that it is selected. Simply drag the task tile to the employee’s task list and drop the tile on their list.

The system helps you to know who to assign to. If an employee is not currently working, the employee row will be shown in a peach color. If the employee does not work in that building

associated with a selected task, their row will be shown in gray, and you will not be allowed to assign to that person.

### Reassign a task

Click on an assigned task tile. You can see the color of the task change so that you know that it has been selected. Drag the drop to another assignable employee's list to change the assignment.

## Decoding the Dashboard: Information, Icons and Indicators

The screenshot shows a dispatch dashboard with three employee rows. Each row includes a header with the employee's name, a task count in a circle, and their current work hours. Below the header are task tiles. Each tile shows the issue type in bold, the location, priority, and a timestamp. A lightning bolt icon is present on each tile, and a settings icon is in the top right of each row.

Employee	Task Count	Work Hours	Task 1	Task 2	Task 3	Task 4
Charlie Coordinator	9	07:00 AM - 04:00 PM	Too Hot (Priority 1)	Leak/Plumbing (Priority 1)	Too Cold (Priority 1)	Cleaning (Priority 1)
Eddie Engineer	4	08:00 AM - 05:00 PM	Engineering Request (Priority 2)	Engineering Request (Priority 2)	Cleaning (Priority 1)	Too Hot (Priority 1)
Molly Manager	16	08:30 AM - 06:30 PM	Engineering Request (Priority 1)	Access Card Request (Priority 2)	Trash Removal (Priority 2)	Meeting Area Request

The dispatch dashboard contains many indicators that help you assign and manage tasks.

1. Task count  : indicates the number of work orders currently assigned to the engineer
2. Out of office  : indicates the employee is out of office. You can still choose to assign to an employee who is out of office
3. Work hours  **07:00 AM - 04:00 PM** : reflects the employee's start and end time today. This is helpful so that you know how much time the employee has left on their current shift (or when they come on to their next shift). The employee work hours can be managed in the admin, employee page.
4. Issue type: The issue type of each work order is listed in bold. If you point to the issue type name and hover over it, a pop-up window will display additional details about the issue. Once you see the details window, you can click on the work order number to navigate to the work order details page.
5. Work order actions  : Click this icon to reassign, change status, schedule, hold or add comment to the work order
6. Tenant name –OR– building name: you have the option to view either the building name or the tenant name on each work order tile. To change your view, click the settings icon.
7. Priority: if your company has set up priorities for the issue type, then the task tile will display the corresponding priority.

8. SLA: if your company has set up target service delivery time frames, a date and time will be displayed for the next step in the process
9. Tile border color: if your company has set up target service delivery time frames, the left tile border will be red if an SLA has been missed on the task. Otherwise the border will be blue.
10. Critical items **!**: indicates that work order is critical.
11. Acknowledged items **✓**: indicates that the work order has been acknowledged
12. Work order list scrolling **< >**: If an employee has more tasks than can be displayed in the row, you can click on right/left arrows on the right of the row in order to move the list left or right to see additional tasks.

## Narrowing Your View

Sometimes you want to see everything that is going on, but other times it's easier to view only the information you need – be that a building, certain issue type, a particular tenant or a single employee.

The screenshot shows the 'Task Dispatch' interface. At the top, there's a blue header with a calendar icon, the title 'Task Dispatch', and a dropdown menu currently set to 'All'. Below the header, there's a section for 'Unassigned Tasks' with a count of 59. A search bar labeled 'Type to filter Assignees' is present, along with a 'Sort By: Last Name' dropdown and a 'Last Refreshed 02:38 PM' timestamp. The main area displays a list of tasks for 'Charlie Coordinator' with a time range of '07:00 AM - 04:00 PM'. The tasks listed are: 'Leak/Plumbing' (Heathwise Systems Center, Priority 1, 12/17 2:39 PM), 'Too Hot' (Heathwise Systems Center, Priority 1, 12/17 2:39 PM), 'Leak/Plumbing' (Heathwise Systems Center, Priority 1, 12/17 2:39 PM), 'Too Cold' (Heathwise Systems Center, Priority 1, 12/17 2:39 PM), and 'Cleaning' (Heathwise Systems Center, Priority 1, 12/17 2:39 PM). Each task tile includes a status icon (checkmark or lightning bolt) and a scroll arrow on the right.

Selecting a building:



There is a dropdown list that allows you to select a specific building (or all). If your company has implemented a regional hierarchy, you will also see any regions that you can view in a separate dropdown list

Finding a task in the unassigned task list:



You can type to narrow the unassigned task list. Start typing letters to describe an issue type, building, tenant, or priority to see a narrowed list including your matches

Finding an employee in the employee list:



You can type to narrow the employee list. Start typing letters in an employee's name to see a narrowed list including your matches

Sorting employees: **Sort By:** **Last Name** 

Using the Sort By drop down you can choose to sort the employee list by last name (alphabetically), by number of currently assigned tasks (Ascending or Descending) or by “end of day” to bring employees with the most time left in their work day to the top of your view

## Settings

You can change many aspects of your view by clicking the settings icon



- Show or hide vendors and unavailable (out of office/off shift) employees from the employee list
- Choose if you want to display building or tenant name in the work order tile
- Select the methods to notify employees of a reassignment when dragging and dropping

## Refreshing

The dispatch view will refresh every 5 minutes automatically. You can refresh your view more frequently using one of the two refresh icons  . There is an icon at the top of the Unassigned Tasks list to refresh this list. There is a separate refresh icon at the top of the employee lists that refreshes this list.