Impairments User Guide

Managing the lifecycle of impaired equipment

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Overview

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:

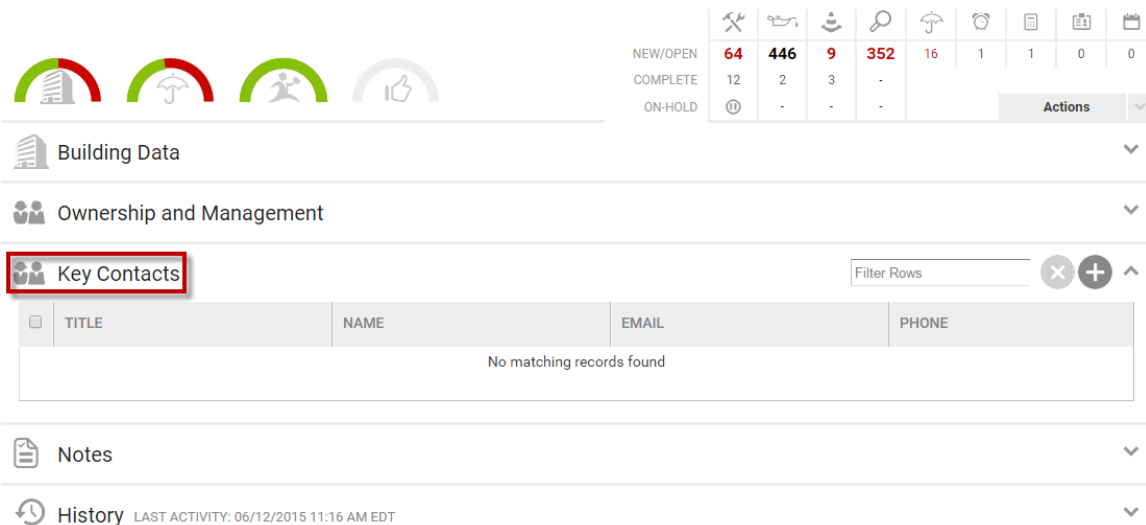1. Click **Admin → System Labels**.
2. Navigate to and click on the **KEY CONTACTS** category.
3. Click the **Add Key Contacts** ⊕ .
4. Use the **Add Key Contacts** field to enter your key contact role name.
5. Click **SAVE**.
6. (Optional) Repeat steps 3-5 until all Key Contact roles have been created.
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. This section describes the process of assigning a key contact role.

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.


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**.
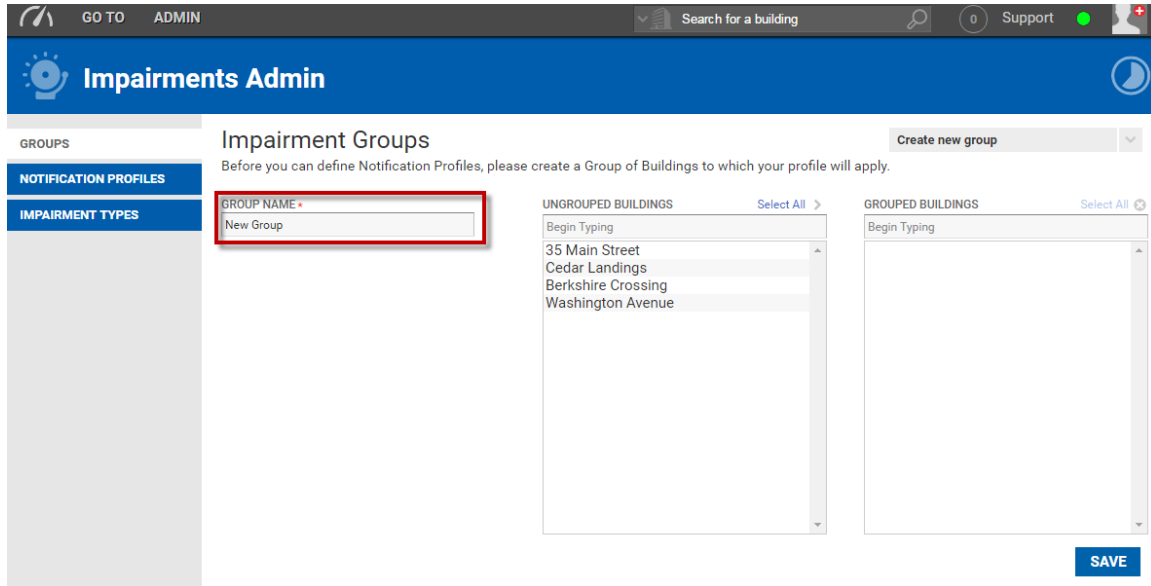
4. Click the building(s) names from the **UNGROUPED BUILDINGS** column. If all buildings are part of the group you can alternatively click **Select All**.

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.
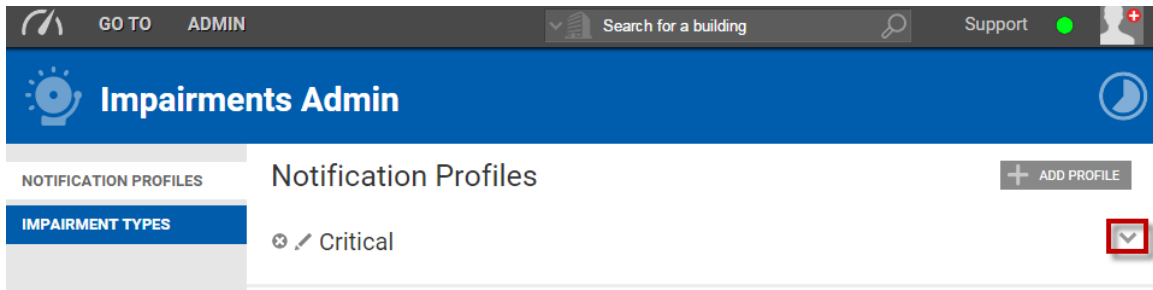
5. Click **Add Rule** ⊕.

6. Select the **ROLE** and Impairment status that triggers a notification and/or reminder.

7. Click **SAVE**.
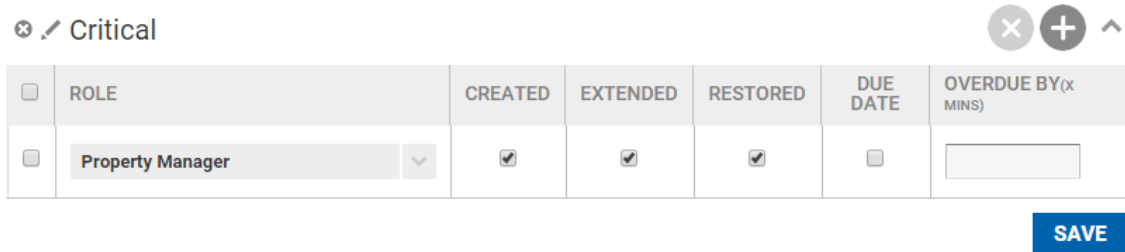
8. (Optional) To create additional notification rules, repeat steps 5-7.

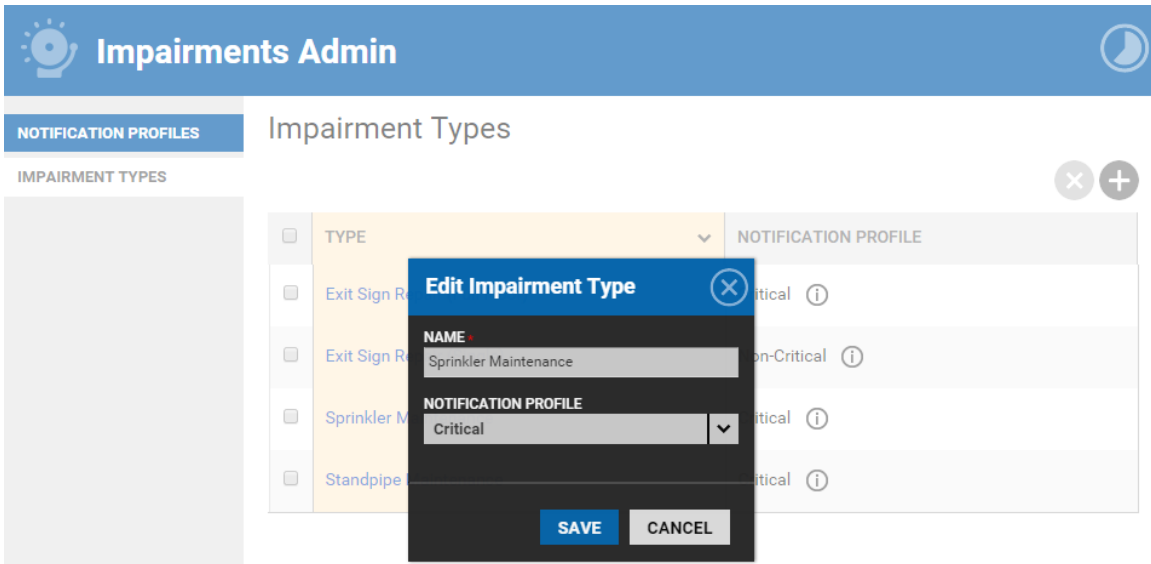9. (Optional) To create additional profiles, repeat steps 2-8.

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:
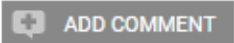
1. Click **Go To → Impairments → Create Impairment**.

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**.

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**.

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**.

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**.