



Mobile Application User Guide



Navigating Building Engines via the mobile application

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Overview

The Building Engines mobile application empowers property and facility teams to stay connected to critical building information at all times and manage and respond to tasks remotely. Easily view and execute day-to-day Work Orders, Incidents, Inspections and Preventive Maintenance from your Android, BlackBerry, iPhone, or iPad.

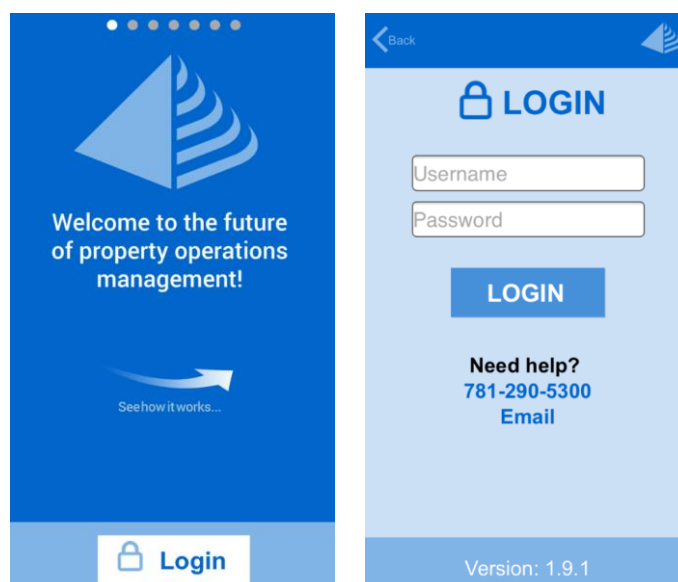
Getting Started

Before logging into the mobile application for the first time seek out a location that has either a good cellular or Wi-Fi connection. Failure to do so may result in extended initial download times.

Logging In

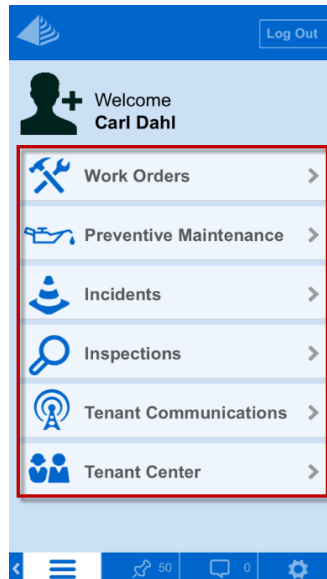
To login into the Building Engines Mobile application:

1. Navigate to the Building Engines icon on your smartphone.
2. Click **Login**.
3. Enter your username and password.
4. Click **LOGIN**.



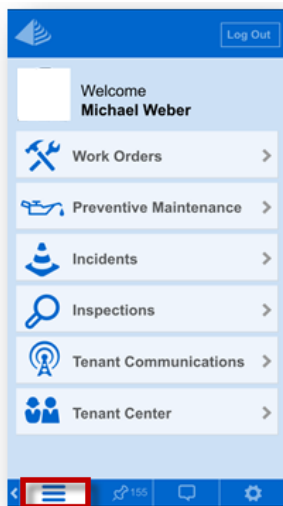
Module Navigation

After you have logged into the application, and depending upon your system role, you are provided with a set of module specific navigational buttons. Using these buttons, you can quickly access Work Orders, Preventive Maintenance, Incidents, Inspections, Tenant Communications, and the Tenant Center.

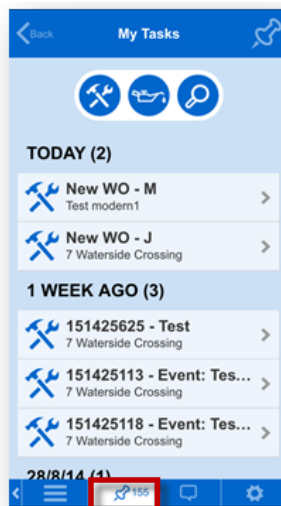


Inter-Application Navigation

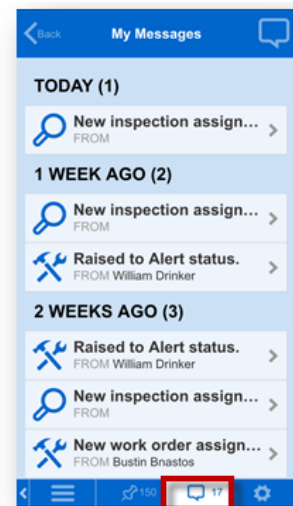
Located along the bottom of the mobile application are the inter-application navigational buttons. Using the buttons highlighted below, you can quickly access the home screen, assigned tasks, and message feed.



- Home button



- My Tasks



- Message Feed



On-Demand Data Refresh Configuration

By default, the Building Engines Mobile Application is configured to automatically refresh data every three minutes. While this setup works great for most users, if you are linked to many buildings it is recommended that you utilize the on-demand data refresh configuration. To minimize user interference, this configuration allows users to choose the most convenient time to synchronize data. This section describes how to setup and then use the on-demand data refresh configuration.


Enabling On-Demand Data Refresh


This section describes the process of configuring the On-demand data refresh configuration on the mobile application.

To enable the on-demand data refresh configuration:

1. Click .
2. Check the box next to **On-demand Synchronization**.
3. Click  to access the home screen.

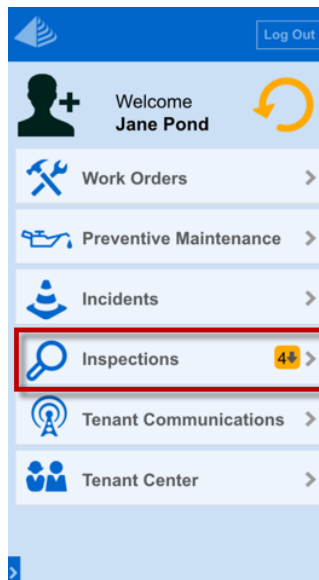
Synchronizing Data While Using On-Demand Data Refresh



If your mobile application is setup to synchronize on-demand, you must manually synchronize the application to the application server. Synchronization can be initiated on an individual module basis, or all modules simultaneously. When a synchronization is required, the  icon appears on the header of the home screen.

Along with the  icon in the header, a number and a directional arrow (up for upload, and down for download) is displayed on the specific module that needs a data refresh. This section describes the process of synchronizing the application on an individual module basis, or via all modules simultaneously.




To synchronize data on a module individually:

1. Click the module that you want to synchronize. *Note: The following image demonstrates a module needing synchronized.*




2. Confirm by clicking **REFRESH**.
3. Once all modules needing a data refresh have been refreshed the  icon turns .

To synchronize data for all modules simultaneously:

1. Click the  located on the header of the home screen.
2. (Optional) To quit the synchronization prior to its completion, click **CANCEL**.
3. Once all modules needing a data refresh have been refreshed the  icon turns .


Work Orders

This section describes the functionality of the Work Order module via the mobile application. *Note: Work Order areas denoted with a  require cellular or Wi-Fi connectivity to access.*

Creating a New Work Order

This section describes how to create a new work order from your mobile device.

To create a work order:

1. Click **Work Orders → Create New Request**.
2. Select a **BUILDING**.
3. 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**.*
4. (Optional) Select an issue type **CATEGORY**.
5. Select a work order **ISSUE TYPE**. *Note: Issue type specific form questions appear when a form template accompanies an issue type.*
6. (Optional) Enter the **LOCATION** of the work order.
7. (Optional) Use the **ASSIGN TO** field to select an assignee.
8. Enter the **DETAILS** of the work order.
9. (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.
10. Click **Create New Request**.

Acknowledging a New Work Order

After a work order has been created, in most cases, it is assigned to an Engineer in the field. If you are the assigned engineer, the first step in the workflow is to acknowledge the new or open work order. This section describes the process of acknowledging a work order.

To acknowledge a new or open work order:

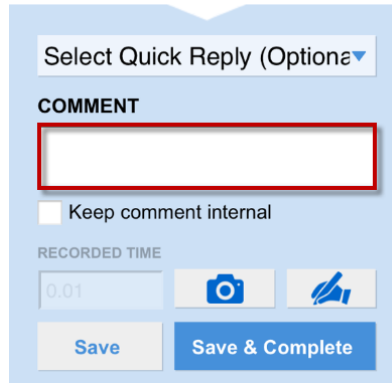
1. Click **Work Orders** → **My Work Orders**.
2. Click the new work order.
3. Click **Acknowledge**.
4. (Optional) If your property management company also uses the "Acknowledge - Arrival" workflow, the **Arrive** button will appear following the **Acknowledge** button.

Adding a Comment to a Work Order

This section describes the process of adding a comment to a work order.

To add a comment to a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to add a comment to.
3. Enter your comment into the **COMMENT** field.

A screenshot of a mobile application interface for adding a comment to a work order. The interface is light blue and contains a dropdown menu at the top labeled "Select Quick Reply (Optional)". Below this is a section titled "COMMENT" with a large white text input field outlined in red. Underneath the input field is a checkbox labeled "Keep comment internal". Below the checkbox is a section titled "RECORDED TIME" with a small input field showing "0.01" and two icons: a camera and a thumbs-up. At the bottom of the form are two buttons: "Save" and "Save & Complete".

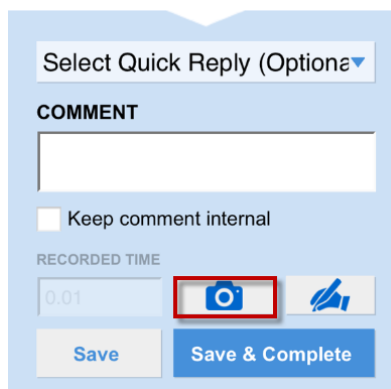
4. (Optional) Click **Keep comment internal** to prevent comment from appearing on tenant interface.
5. Click **Save**, or **Save & Complete**.

Adding a Photo to a Work Order

This section describes the process of adding a photo to a work order.

To add a photo to a work order:

11. Click **Work Orders** → **My Work Orders**.
12. Navigate to and click on the work order you want to add a picture to.
13. Click the camera icon.



14. Choose to **Take Camera Photo** or **Add From Gallery**.
15. **Take Camera Photo** enables your smartphone's integrated camera.
16. **Add From Gallery** allows you to access a previously taken photo from your smartphone's photo gallery.
17. (Optional) To draw on the photo, click **Draw**, select a color, and use your finger or stylus to draw on the photo.
18. Click **Use**.
19. (Optional) Enter a comment to accompany the photo.
20. Click **Save** or **Add More** to add additional photos.

Adding a Signature to a Work Order

This section describes the process of adding a signature to a work order.

To add a signature to a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to add a signature to.

3. Click the signature icon.

4. Using a stylus or fingertip, write a signature in the top section of the screen.

5. Enter the signature owners **FIRST NAME** and **LAST NAME**.
6. (Optional) To remove a signature click **CLEAR**.
7. Click **SAVE**.

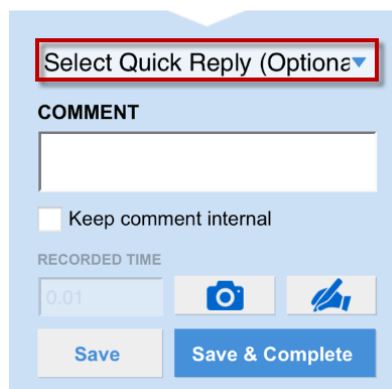
Adding a Quick Reply to a Work Order

Before quick replies can be used on a work order they must be configured and set up from the desktop application. If you don't have access to creating quick replies on the desktop application please reach out to your dedicated Client Account Manager or the Support team for assistance.

To add a quick reply to a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to add a quick reply to.

3. Select a quick reply from the dropdown.



4. Click **Save** or **Save & Complete**.

Editing the Details of a Work Order

This section describes the process of editing the details of a work order.

To edit the details of the work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to edit the details of.
3. Scroll down to the **Details** section, and click into the **DETAILS** field.
4. Edit the existing details, and click **Save Details**.

Viewing and Editing Additional Questions

If a work order issue type is linked to issue type specific questions than a section called Additional Questions appears following the work order Details. This section of the user guide describes how to view and edit the Additional Question answers.

To view and edit additional question answers linked to a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on a work order.
3. Scroll down to the **Additional Questions** sections to view the questions and answers linked to the work order issue type.
4. (Optional) To edit a question's answer:
 - a. Navigate to the questions.
 - b. Edit the answer.
 - c. Click **Save**.

Reassigning a Work Order

This section describes the process of reassigning a work order. **Note:** If the reassignment functionality is not present in your account, and it should be, reach out to your Client Account Manager to gain access.

To reassign a work order:

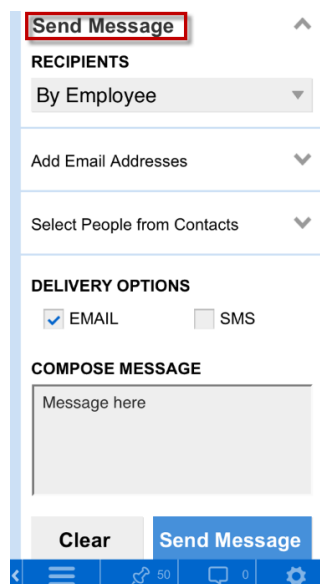
1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to reassign.
3. Scroll down and click **Reassign Task**.
4. Using the **ASSIGN TO** field, select an assignee.
5. (Optional) Enter in a comment for the new assignee.
6. (Optional) Click **Keep comment internal** to prevent comment from appearing on tenant interface.
7. Select a notification method, and click **Reassign Task**.

Sending a Message from within a Work Order

This section describes the process of sending a message from within the work order.

To send a message:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to send a message from.
3. Scroll down and click **Send Message**.



The screenshot shows a mobile application interface for sending a message. At the top, there is a "Send Message" button highlighted with a red box. Below it, the "RECIPIENTS" section includes a dropdown menu set to "By Employee", followed by "Add Email Addresses" and "Select People from Contacts" options. The "DELIVERY OPTIONS" section has checkboxes for "EMAIL" (checked) and "SMS". The "COMPOSE MESSAGE" section features a text input field with the placeholder "Message here". At the bottom, there are "Clear" and "Send Message" buttons. The bottom navigation bar shows a home icon, a notification icon with "50", a chat icon with "0", and a settings icon.

4. Select message recipients.
 - a. **Filter By Contact Type:** Sorts contacts by system role.
 - b. **Add Email Addresses:** Allows you to manually enter in email addresses.
 - c. **Select People from Contacts:** Allows you to select message recipients from users within the application.
5. Select a method of delivery by clicking **EMAIL** or **SMS**.
6. Enter a message into the **COMPOSE MESSAGE** field, and click **Send Message**.

Adding Labor to a Work Order

Billable and non-billable labor can be added to a work order. This section describes the process of adding labor to a work order.

To add labor to a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to add labor to.
3. Scroll down and click **Add Labor**.
4. Using the **HOURS** field, Enter the labor hours.

Note: Partial hours must include a "0" before the decimal point. Ex: 0.5.
5. (Optional) Select a labor rate.
6. (Optional) Select an markup.
7. (Optional) Click **Billable** to make the labor billable.
8. Click **Add Labor**.

Adding a Material to a Work Order

Billable and non-billable materials can be added to a work order. This section describes the process of adding materials to a work order.

To add a material to a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to add a material to.
3. Scroll down and click **Add Material**.
4. (Optional) Select a **CATEGORY**.
5. Select a **MATERIAL**.

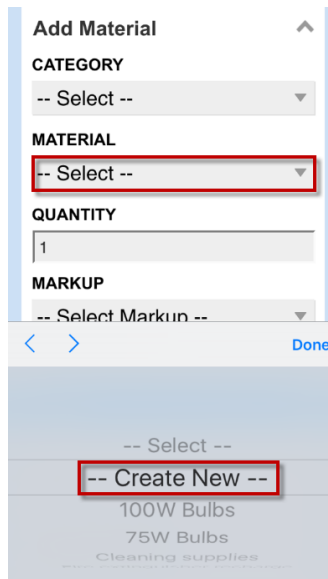
6. Add material **QUANTITY**.
7. (Optional) Select a **MARKUP**.
8. (Optional) Click **Billable** to make the material billable.
9. Click **Add Material**.

Creating a New Material for a Work Order

If you are required to add a material to a work order that is not present in your list of available materials you can create the new material via the mobile application. This section describes the process of creating and then adding a new material.

To create a new material for a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to add a material to.
3. Scroll down and click **Add Material**.
4. Click the **MATERIAL** field, and select **-- Create New --**.



5. Select a **CATEGORY**.
6. Enter the material **NAME** and **COST**.
7. (Optional) Select a **MARKUP**.
8. (Optional) Click the **TAXABLE** box if the material is taxable.
9. Click **SAVE** to finish creating the material.

10.(Optional) Following the creation of the new material, you can add the new material to a work order.

To add the new material to a work order:

- a. Enter the **QUANTITY** of the new material.
- b. (Optional) Select a **MARKUP**.
- c. (Optional) Click **Billable** to make the material billable.
- d. Click **Add Material** to add the material to the work order.

Viewing a File on a Work Order

This section describes the process of viewing files or photos linked to a work order.

To view a file linked to a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to view the files of.
3. Scroll down and click **Files**.
4. Select the file you want to view.
5. (Optional) Click **Add Photo** to either take a picture with your smartphone's camera or access a photo from your smartphone's photo gallery.
6. (Optional) If you choose to add a photo, click **SAVE**.

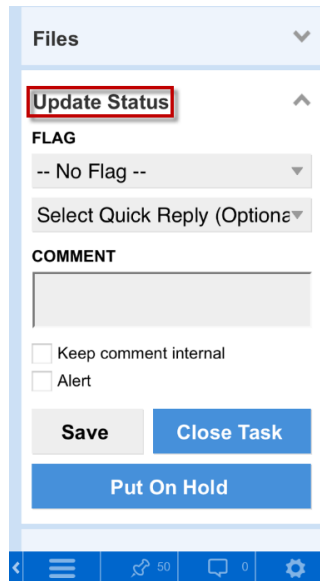
Updating the Status of a Work Order

This section describes the process of updating the status of a work order.

To update the status of a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to change the status of.

3. Scroll down and click **Update Status**.



4. (Optional) Click **Flag** to flag a work order.
5. (Optional) Click either **Select Quick Reply**, or enter a comment into the **COMMENT** field.
6. (Optional) **Keep Comment Internal**: Prevents the comment from displaying on the tenant interface.
7. (Optional) **Alert**: This will turn the work order text red and add a red flag to the work order when displayed on the list or desktop grid.
8. Click either **Save**, or **Close Task**.

Viewing the History of a Work Order

This section describes the process of viewing the history of a work order.

To view the history of a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to view the history of.
3. Scroll down and click **History**.

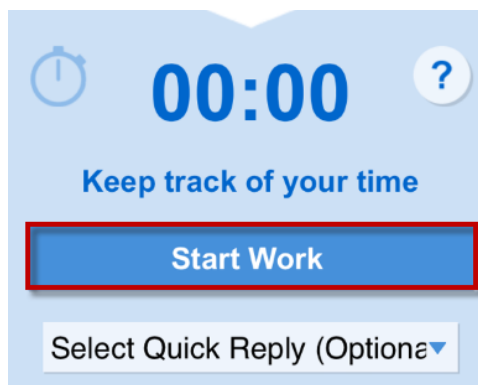
Using Time Tracking on a Work Order

Time Tracking is an optional feature within the mobile application which is used to keep track of the time spent on Work Orders, Preventive Maintenance, and Inspections. Time can only be running for one task at a time, and can be paused, or

overridden as necessary. This section describes how to use the time tracking feature on work orders via the mobile application.

To start the time tracking feature on a work order:

1. Click **Work Orders** → **My Work Orders**.
2. Navigate to and click on the work order you want to turn time tracking on for.
3. Click **Start Work**.



4. (Optional) To pause the timer, click **Pause Work**. Click **Resume Work** when you are ready to pick up where you left off.
5. After you complete the work order, click **Stop Work**.
6. (Optional) Manually override the timer by entering in the **Recorded Time** and **Billable Time**.
7. (Optional) If the time is billable, click **Billable**.
8. (Optional) Select a **LABOR RATE** and/or **MARKUP**.

9. Click **Commit** to record the time in the work order.

FLOOR 1 SUITE 102
LOCATION Kitchen

00:00 ?

Timer Stopped

Billable

Recorded Time 01:40


Billable Time 02:00

LABOR RATE
Engineers Rate

MARKUP
-- Select Markup --

Resume Commit

Preventive Maintenance

This section describes the functionality of the Preventive Maintenance module via the mobile application. *Note: Preventive Maintenance areas denoted with a  require cellular or Wi-Fi connectivity to access.*

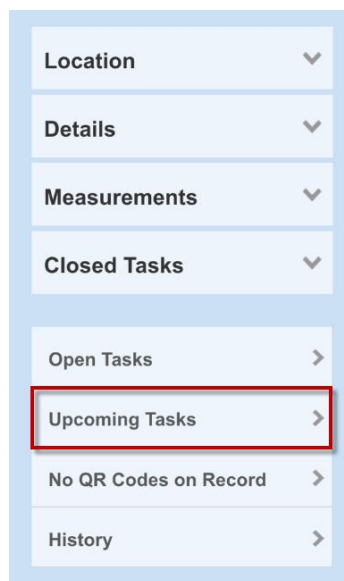
Firing an Upcoming PM Task

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

To fire an upcoming PM task:

1. Click **Preventive Maintenance** → **Equipment Search**.
2. Select a **BUILDING** and **CATEGORY**.
3. Set the **STATUS** to **Operational**.
4. (Optional) If you know the **NAME, MAKE, MODEL, or ASSET TAG** information, enter it into the appropriate field.
5. Click **Search**.
6. Select the piece of equipment which corresponds to the PM task you want to fire ahead of its scheduled time.

7. Scroll down the equipment record and click **Upcoming Tasks**.



8. Select the PM task you want to fire.
9. Click **Fire Now**.

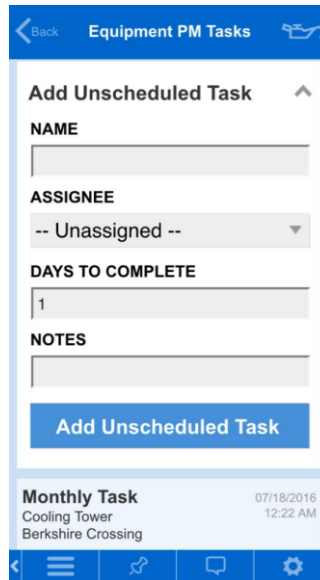
Creating an Unscheduled PM Task

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.

To create an unscheduled PM task:

1. Click **Preventive Maintenance → My Tasks**.
2. Click **Equipment Search**.
3. Select the **BUILDING** and **CATEGORY** of equipment that the equipment resides under.
4. Select the **STATUS** of the equipment.
5. (Optional) If you know the **NAME, MAKE, MODEL**, or **ASSET TAG** number, enter it into its respective field. *Note: Partial names or values are acceptable.*
6. Click **Search**.
7. Select the piece of equipment you want to create the unscheduled task for.
8. Scroll down the equipment record and click **Open Tasks**.
9. Click **Add Unscheduled Task**.

10. Enter a task **NAME**, select an **ASSIGNEE**, the **DAYS TO COMPLETE** (Note: If the task takes longer than this number to complete the task is considered overdue), and any relevant **NOTES**.



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

Starting a PM Task

This section describes the process of starting a PM task from the mobile device.

To start a PM task:

1. Click **Preventive Maintenance** → **My Tasks**.
2. Navigate to and click on the PM task you want to begin. *Note: If the Time Tracking feature has been configured for your account, click **Start Work**.*

Pausing a PM Task

Note: This functionality is only present if the Time Tracking feature has been configured for your account.

If at any point during the course of a PM task you need to stop working on the task, you can pause the time tracking component of the task. To pause a PM task, click **Pause Work**. When you are ready to begin working on the task again, click **Resume Work**.

Committing Time to a PM Task

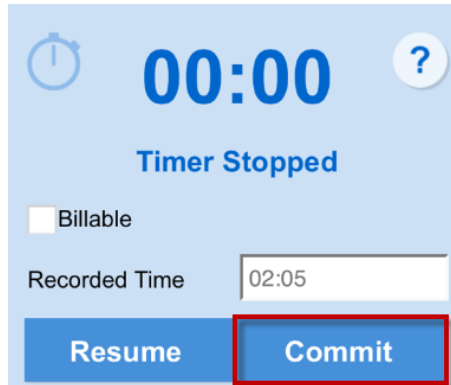
Note: This functionality is only present if the Time Tracking feature has been configured for your account.

After you have completed the PM task and its associated steps you need to stop the timer, confirm the time spent on the task, and mark if it is billable.

To commit time to a PM task:

1. Click **Stop Work**.
2. If the time displayed in the **Recorded Time** field does not accurately reflect the time spent on the PM task:
 - a. Tap the **Recorded Time** field.
 - b. Edit the time and click **Set**.
3. (Optional) If the time spent on the PM task is billable, click **Billable**.
4. Click **Commit** to log the time in the history of the PM task.

Note: After **Commit** is clicked the **Add Labor** section of the inspection is expanded and you are given the ability to labor details to the PM task.



Adding a Comment to a PM Task

This section describes the process of adding a comment to a PM Task.


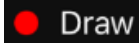
To add a comment to a task:

1. Click **Preventive Maintenance** → **My Tasks**.
2. Navigate to and click on the PM task you want to add a comment to.
3. Enter your comment into the **COMMENT** field.
4. Click **Save**, or **Save & Complete**.

Adding a Photo to a PM Task

This section describes the process of adding a photo to a PM Task.

To add a photo to a PM task:

1. Click **Preventive Maintenance → My Tasks**.
2. Navigate to and click on the PM task you want to add a picture to.
3. Click the camera  icon.
4. Choose to **Take Camera Photo** or **Add From Gallery**.
 - a. **Take Camera Photo** enables your smartphone's integrated camera.
 - b. **Add From Gallery** allows you to access a previously taken photo from your smartphone's photo gallery.
5. (Optional) To draw on the photo, click , select a color, and use your finger or stylus to draw on the photo.
6. Click **Use**.
7. (Optional) Enter a comment to accompany the photo.
8. Click **Save** or **Add More** to add additional photos.

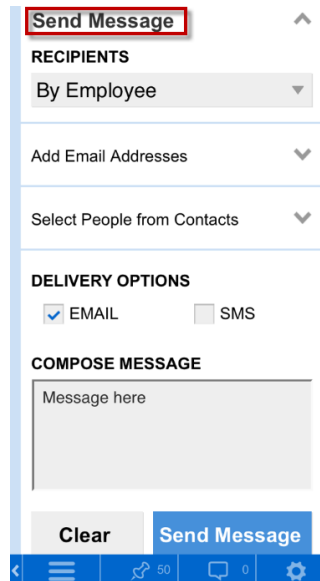
Sending a Message from within a PM Task

This section describes the process of sending a message from within the PM task.

To send a message:

1. Click **Preventive Maintenance → My Tasks**.
2. Navigate to and click on the PM task you want to send a message from.

3. Scroll down and click **Send Message**.



4. Select message recipients.
 - d. **Filter By Contact Type:** Sorts contacts by system role.
 - e. **Add Email Addresses:** Allows you to manually enter in email addresses.
 - f. **Select People from Contacts:** Allows you to select message recipients from users within the application.
5. Select a method of delivery by clicking **EMAIL** or **SMS**.
6. Enter a message into the **COMPOSE MESSAGE** field, and click **Send Message**.

Adding a Material to a PM Task

This section describes the process of adding materials to your PM tasks.

To add a material to a PM task:

1. Click **Preventive Maintenance** → **My Tasks**.
2. Navigate to and click on the PM task you want to add a material to.
3. Scroll down and click **Add Material**.
4. (Optional) Select a **CATEGORY**.
5. Select a **MATERIAL**.
6. Add material **QUANTITY**.
7. (Optional) Select an **MARKUP**.
8. Click **Add Material** to add the material to a PM task.

Creating a New Material for a PM Task

If you are required to add a material to a PM Task that is not present in your list of available materials, you can create the new material via the mobile application. This section describes the process of creating and then adding the new material via the mobile application.

To create a new material for a PM Task:

1. Click **Preventive Maintenance → My Tasks**.
2. Navigate to and click on the PM task you want to add a material to.
3. Scroll down and click **Add Material**.
4. Click the **MATERIAL** field, and select **-- Create New --**.
5. Select a **CATEGORY**.
6. Enter the material **NAME** and **COST**.
7. (Optional) Select a **MARKUP**.
8. (Optional) Click the **TAXABLE** box if the material is taxable.
9. Click **SAVE** to finish creating the material.
10. (Optional) Following the creation of the new material, you can add the new material to a PM task. To add the new material to a PM task:
 - a. Enter the **QUANTITY** of the new material.
 - b. (Optional) Select a **MARKUP**.
 - c. (Optional) Click **Billable** to make the material billable.
 - d. Click **Add Material** to add the material to the PM task.

Completing PM Task Steps

After **Start Work** is clicked on a new PM task the task's steps appear below the **Send Message** section. This section describes how to complete the PM task steps.

To complete the PM task steps:

1. Click **Preventive Maintenance → My Tasks**.
2. Navigate to and click on the intended PM task.
3. Scroll down and click on the **Steps** section.
4. Click **Save Changes** once you are finished with the steps.

Viewing a File on a PM Task

This section describes the process of viewing files or photos linked to a PM task.

To view a file linked to a PM task:

1. Click **Preventive Maintenance** → **My Tasks**.
2. Navigate to and click on the PM task you want to view the files of.
3. Scroll down and click **Files**.
4. Select the file you want to view.
5. (Optional) Click **Add Photo** to either take a picture with your smartphone's camera or access a photo from your smartphone's photo gallery.
6. (Optional) If you choose to add a photo, click **SAVE**.

Viewing the History of a PM Task

This section describes the process of viewing the history of a PM Task.

To view the history of a task:

1. Click **Preventive Maintenance** → **My Tasks**.
2. Navigate to and click on the task you want to view the history of.
3. Scroll down and click **History**.

Adding an Equipment Record

Preventive Maintenance equipment records can be created through the desktop or mobile application. This section describes the process of creating an equipment record through the mobile application.

To create an equipment record:

1. Click **Preventive Maintenance**.
2. Click **Equipment Search**.
3. Click **Add Record**.
4. Enter a **NAME**, **STATUS**, and **CATEGORY**.
5. (Optional) Enter the **Location**, **Details**, and **Measurements** information.
6. Click **Save**.
7. (optional) To edit the equipment record, click **Edit**.
8. (Optional) To delete the equipment record, click **Delete**.

Editing an Equipment Record

This section describes the process of editing a Preventive Maintenance equipment record from the mobile application.

To update an equipment record:

1. Click **Preventive Maintenance**.
2. Click **Equipment Search**.
3. Select the **BUILDING** and **CATEGORY** of equipment that the equipment resides under.
4. Select the **STATUS** of the equipment.
5. (Optional) If you know the **NAME, MAKE, MODEL**, or **ASSET TAG** number, enter it into its respective field. *Note: Partial names or values are acceptable.*
6. Click **Search**.
7. Select the piece of equipment you want to edit.
8. Click **Edit** and use the sections and fields to make your edits.
9. Click **Save**.

Deleting an Equipment Record

This section describes the process of deleting a Preventive Maintenance equipment record from the mobile application.

To delete an equipment record:

1. Click **Preventive Maintenance**.
2. Click **Equipment Search**.
3. Select the **BUILDING** and **CATEGORY** of equipment that the equipment resides under.
4. Select the **STATUS** of the equipment.
5. (Optional) If you know the **NAME, MAKE, MODEL**, or **ASSET TAG** number, enter it into its respective field. *Note: Partial names or values are acceptable.*
6. Click **Search**.
7. Select the piece of equipment you want to delete.
8. Scroll down the equipment record and click **Delete**.

Searching for an Equipment Record

The Mobile Application allows you to search for a piece of equipment using a series of imbedded search filters. This section describes the process of searching for a piece of equipment.

To search for a piece of equipment:

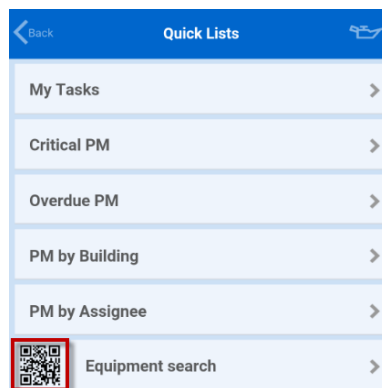
1. Click **Preventive Maintenance**.
2. Click **Equipment Search**.
3. Select a **BUILDING, CATEGORY, STATUS, FLOOR,** and **NAME, MAKE, OR MODEL**. *Note: Partial values for the **NAME, MAKE, OR MODEL** are acceptable.*
4. (Optional) Enter the **ASSET TAG**.
5. Click **Search**.
6. If the equipment information is a match, a list of equipment records appears. From this list, select the piece of equipment you want to access.

Searching for an Equipment Record by QR Code

If configured, the Mobile Application allows you to search for a piece of equipment using a QR code. This section describes the process of searching for a piece of equipment using a QR code.

To search for a piece of equipment using a QR code:

1. Click **Preventive Maintenance**.
2. Click the QR code icon and use the reader to scan the QR code.



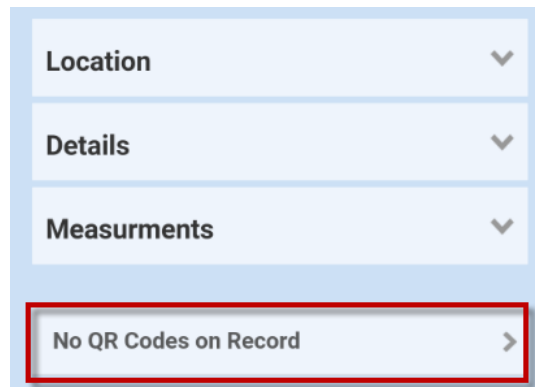
3. If the QR code is a match to an existing QR code in the application then the equipment record is displayed.

Adding a QR Code to a Piece of Equipment

If your building's equipment has been labeled with QR codes you can use the Mobile Application to associate the QR code to the equipment record. Once a QR code has been associated to a piece of equipment you can easily use the QR code to search for equipment records, tasks, and historical maintenance. This section describes the process of adding a QR code to a piece of equipment.

To add a QR code to a piece of equipment:

1. Click **Preventive Maintenance**.
2. Click **Equipment Search**.
3. Select a **BUILDING, CATEGORY, STATUS, FLOOR,** and **NAME, MAKE, OR MODEL**. *Note: Partial values for the **NAME, MAKE, OR MODEL** are acceptable.*
4. (Optional) Enter the **ASSET TAG**.
5. Click **Search**.
6. If the equipment information is a match, a list of equipment records appears. From this list, select the piece of equipment you want to add a QR code to.
7. Click **No QR Codes on Record**.



8. Click **Add New**, and use your mobile device to scan the QR code.
9. Click **OK** to save.
10. (Optional) To add additional QR codes, repeat steps 7-9. *Note: Multiple QR codes can be associated to the same piece of equipment, however, only one piece of equipment can be associated to a QR code.*

Deleting a QR Code from a Piece of Equipment

This section describes the process of deleting a QR Code from a piece of equipment.

To delete a QR code from a piece of equipment:

1. Click **Preventive Maintenance**.
2. Click **Equipment Search**.
3. Select a **BUILDING, CATEGORY, STATUS, FLOOR, and NAME, MAKE, OR MODEL**. *Note: Partial values for the **NAME, MAKE, OR MODEL** are acceptable.*
4. (Optional) Enter the **ASSET TAG**.
5. Click **Search**.
6. From the list of equipment, select the piece of equipment you want to remove a QR code from.
7. Click **QR Codes**.
8. Select the QR code(s) you want removed and click **Delete QRs**.

Incidents

The Incidents module allows you to create new incidents, as well as view the progress of existing incidents. This section describes the functionality of the Incidents module via the mobile application.

Creating a New Incident

This section describes how to create a new incident from your mobile device.

To create an incident:

1. Click **Incidents** → **Create Incidents**.
2. Click **Create Incident**.
3. Select the **BUILDING, TYPE, FLOOR, and LOCATION** of where the incident occurred.
4. (Optional) If the Police are involved, enter their information into the optional fields.
5. (Optional) If the Insurance Carrier has been contacted, click **INSURANCE CARRIER NOTIFIED**.
6. (Optional) To add a photo, click **Add Photo**.
7. Click **Create New Incident**.

Viewing an Incident

This section describes how to locate and edit an existing incident via the mobile application.

To view an existing incident:

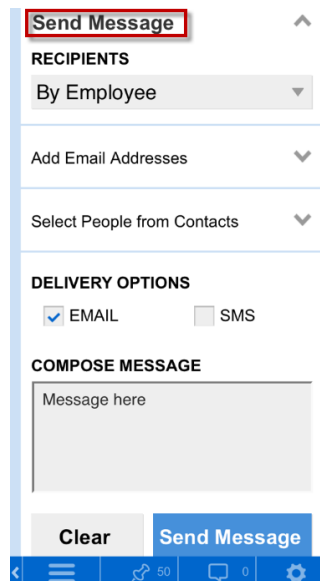
1. Click **Incidents**.
2. (Optional) Use the **Buildings** field to sort by a particular building.
3. Navigate to the intended incident, and click it.
4. Optional: To edit a field, click on the field, make your desired edits, and click **Save Details**.

Sending a Message from within an Incident

This section describes the process of sending a message from within the incident.

To send a message:

1. Click **Incidents**.
2. Navigate to and click on the incident you want to send a message from.
3. Scroll down and click **Send Message**.



4. Select message recipients.
 - a. **Filter By Contact Type**: Sorts contacts by system role.
 - b. **Add Email Addresses**: Allows you to manually enter in email addresses.
 - c. **Select People from Contacts**: Allows you to select message recipients from users within the application.

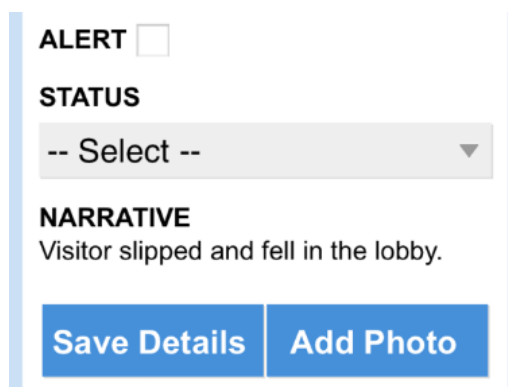
- d. Select a method of delivery by clicking **EMAIL** or **SMS**.
5. Enter a message into the **COMPOSE MESSAGE** field, and click **Send Message**.

Adding a Photo to an Incident

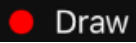
This section describes the process of adding a photo to an existing incident.

To add a photo to an incident:

1. Click **Incidents**.
2. Navigate to and click on the incident you want to add a picture to.
3. Click **Add Photo**.



The screenshot shows a mobile application interface for editing an incident. It features a form with the following elements: an 'ALERT' checkbox, a 'STATUS' dropdown menu currently set to '-- Select --', and a 'NARRATIVE' text area containing the text 'Visitor slipped and fell in the lobby.' At the bottom of the form are two blue buttons: 'Save Details' and 'Add Photo'.

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

Viewing a File on an Incident

This section describes the process of viewing files or photos linked to an incident.

To view a file linked to an incident:

1. Click **Incidents**.

2. Navigate to and click on the incident you want to view the files of.
3. Scroll down and click **Files**.
4. Select the file you want to view.
5. (Optional) Click **Add Photo** to either take a picture with your smartphone's camera or access a photo from your smartphone's photo gallery.
6. (Optional) If you choose to add a photo, click **SAVE**.

Viewing the History of an Incident.

This section describes the process of viewing the history of an incident.

To view the history of an incident:

1. Click **Incidents**.
2. Navigate to and click on the incident you want to view the history of.
3. Scroll down and click **History**.

Inspections

This section describes the functionality of the Inspections module via the mobile application.

Creating a New Inspection

This section describes how to create a new inspection from your mobile device.

To create an inspection:

1. Click **Inspections → Create Inspection**.
2. Select a **TEMPLATE**, provide an **INSPECTION NAME**, select a **BUILDING**, an **ASSIGNEE**, and click **Create Inspection**.

Starting an Inspection

Note: This functionality is only present if the Time Tracking feature has been configured for your account.

This section describes the process of starting an inspection from the mobile device.

Note:

To start an inspection:

1. Click **Inspections → My Inspections**.

2. Navigate to and click on the inspection you want to begin.
3. Click **Start Work**.

Pausing an Inspection

Note: This functionality is only present if the Time Tracking feature has been configured for your account.

If at any point during the course of an inspection you need to stop working on the inspection, you can pause the time tracking component of the inspection. To pause an inspection, click **Pause Work**. When you are ready to begin working on the inspection again, click **Resume Work**.

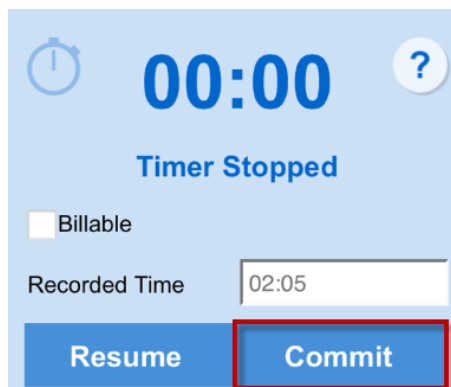
Committing Time to an Inspection

Note: This functionality is only present if the Time Tracking feature has been configured for your account.

After you have completed the inspection and its associated questions you need to stop the timer, confirm the time spent on the inspection, and mark if it is billable.

To commit time to an inspection:

1. Click **Stop Work**.
2. If the time displayed in the **Recorded Time** field does not accurately reflect the time spent on the inspection:
 - a. Tap the **Recorded Time** field.
 - b. Edit the time and click **Set**.
3. (Optional) If the time spent on the inspection is billable, click **Billable**.
4. Click **Commit** to log the time in the history of the inspection. Note: After **Commit** is clicked the **Add Labor** section of the inspection is expanded and you are given the ability to add labor details to the inspection.

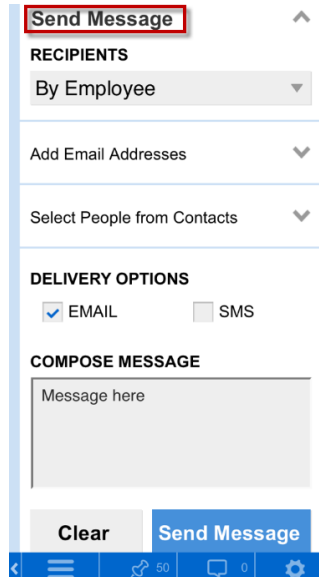


Sending a Message from within an Inspection

This section describes the process of sending a message from within the inspection.

To send a message:

1. Click **Inspections** → **My Inspections**.
2. Navigate to and click on the inspection you want to send a message from.
3. Scroll down and click **Send Message**.




4. Select message recipients.
 - a. **Filter By Contact Type:** Sorts contacts by system role.
 - b. **Add Email Addresses:** Allows you to manually enter in email addresses.
 - c. **Select People from Contacts:** Allows you to select message recipients from users within the application.
 - d. Select a method of delivery by clicking **EMAIL** or **SMS**.
5. Enter a message into the **COMPOSE MESSAGE** field, and click **Send Message**.

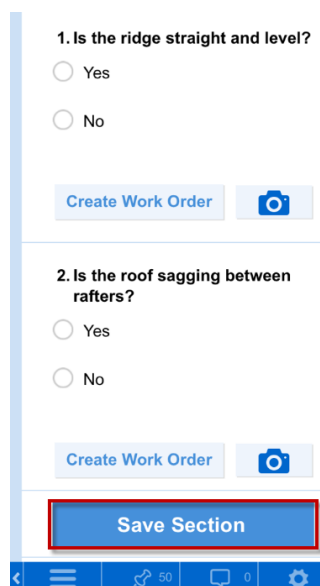
Completing Inspection Questions

After **Start Work** is clicked on a new inspection the inspection's questions appear below the **Send Message** section. This section describes how to complete the inspection questions.

To complete the inspection questions:

1. Click **Inspections** → **My Inspections**.

2. Navigate to and click on the intended inspection.
3. Scroll down and click on the **Questions** section. Note: If question sections are present, click the section to view that sections questions.
4. (Optional) If you want to create a work order associated to the inspection, click **Create Work Order**.
5. (Optional) If you want to add a picture to a inspection question, click the  icon.
6. Click **Save Section** once you are finished with a section.




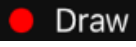
7. Once all of the inspection questions have been completed, commit your time, and click **Complete Inspection**.

Adding a Photo to an Inspection

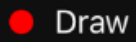
It is common for photos to be included in an inspection. Depending upon how the inspection was created, you may be required to use a photo to answer a question, or add a photo as a supplement to your text based answer. This section describes the process of adding photos to your inspection.

To add a photo to a specific question in an inspection:

1. Click **Inspections** → **My Inspections**.
2. Navigate to the inspection you want to add a photo to.
3. Scroll down and click on the **Questions** section. Note: If question sections are present, click the section to view that sections questions.
4. Locate the question you want to add a photo to and click the  icon.

5. Click either **Take Camera Photo** to use your device's integrated camera, or click **Add From Gallery** to access your device's photo gallery.
6. (Optional) To draw on the photo, click , select a color, and use your finger or stylus to draw on the photo.
7. Click **Use**.
8. (Optional) Enter a comment to accompany the photo.
9. Click **Save** or **Add More** to add additional photos.

To add a photo into the Files section of an inspection:

1. Click **Inspections** → **My Inspections**.
2. Navigate to and click on the inspection you want to add a photo to.
3. Scroll down and click on the **Files** section.
4. Click **Add Photo**.
5. Click either **Take Camera Photo** to use your device's integrated camera, or click **Add From Gallery** to access your device's photo gallery.
6. (Optional) To draw on the photo, click , select a color, and use your finger or stylus to draw on the photo.
7. Click **Use**.
8. (Optional) Enter a comment to accompany the photo.
9. Click **Save** or **Add More** to add additional photos.

Viewing the History of an Inspection

This section describes the process of viewing the history of an inspection.

To view the history of an inspection:

1. Click **Inspections** → **My Inspections**.
2. Navigate to and click on the inspection you want to view the history of.
3. Scroll down and click **History**.

Impairments

The Impairments module allows you to decommission and recommission equipment from the mobile application. While in an impairment you also have the ability to add comments, link PM tasks, add time extensions, and view the history of existing impairments. This section describes the mobile functionality of the Impairments module.

Creating an Impairment

This section describes the process of creating an equipment impairment.

To create an impairment:

1. Click **Impairments** → **Create Impairment**.
2. Select a **BUILDING** and **IMPAIRMENT TYPE**.
3. Click the **START** field and use the date and time selector to enter the date and time that the impairment begins.
4. Click either the **EXPECTED DURATION** or **EXPECTED RESTORED** field to enter the amount of time the equipment is to be decommissioned.
5. Enter a **DESCRIPTION** of the impairment.
6. Enter the **SYSTEMS** involved in the impairment.
7. (Optional) If you want to link a preventive maintenance task to the impairment:
 - a. Click the **Linked Tasks** section.
 - b. Click **Link Task**.
 - c. (Optional) Select a **BUILDING** to sort PM tasks by building.
 - d. Select a PM task from the list.
 - e. (Optional) Enter a **COMMENT** or number of **HOURS** needed to complete the PM task.
 - f. Click **Link Task**.

8. If an impairment type requires that a **NOTIFICATION** recipient be contacted by phone, call the contact, and slide the **Notified** button to the right. *Note: The following image is an example of a phone contact who has been notified.*

DESCRIPTION*

Flush standpipes

SYSTEMS*

Standpipe

Linked Tasks ▾

NOTIFICATIONS*

Fire Chief
(555)555-5555

Notified

Create Impairment

9. Click **Create Impairment**.

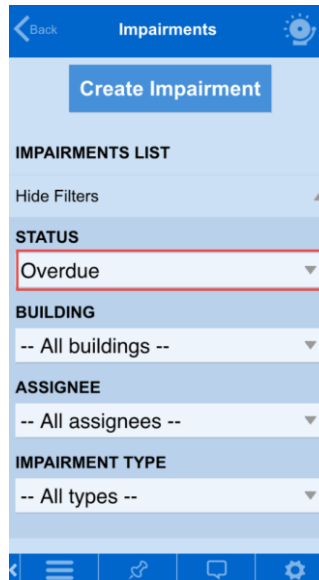
Searching for an Impairment

This section describes the process of locating and viewing an equipment impairment.

To search and view an impairment:

1. Click **Impairments**.

- Using the search filters, locate and click the impairment you want to view.
*Tip: If you are unable to locate an impairment that you believe is open, try executing a **STATUS** search using **Overdue**.*



- Following your search, click the impairment that you want to view.

Adding a Comment to an Impairment

This section describes the process of adding a comment to an impairment.

To add a comment to an impairment:

- Click **Impairments**.
- Using the search filters, locate and click the impairment you want to add a comment to.
- Scroll down to the **Comments** section and click **Add Comment**.
- Enter your comment and click **Save**.

Linking a Task to an Impairment

This section describes the process of linking a preventive maintenance (PM) task to an equipment impairment.

To link a PM task to an impairment:

- Click **Impairments**.
- Using the search filters, locate and click the impairment you want to link a PM task to.

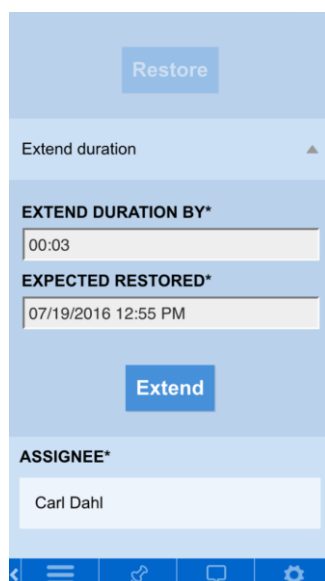
3. Scroll down and click the **Linked Tasks** section.
4. Click **Link Task**.
5. (Optional) Select a **BUILDING** to sort PM tasks by building.
6. Click a PM task from the list.
7. (Optional) Enter a **COMMENT** and/or number of **HOURS** needed to complete the PM task.
8. Click **Link Task**.

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 **Impairments**.
2. Using the search filters, locate and click the impairment you want to extend.
3. Click the **Extend Duration** section to expand.
4. Click either the **EXTEND DURATION BY** or **EXPECTED RESTORED** field to enter the impairment extension. *Note: The EXTEND DURATION BY field only allows an hours and minutes extension whereas the EXPECTED DURATION also allows a date.*



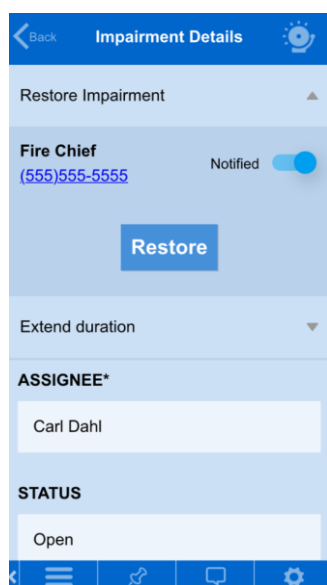
5. Click **Extend**.

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 **Impairments**.
2. Using the search filters, locate and click the impairment you want to restore.
3. Click the **Restore Impairment** section to expand.
4. If an impairment type requires that a **NOTIFICATION** recipient be contacted by phone, call the contact, and slide the **Notified** button to the right.



5. Click **Restore**.

Viewing the History of an Impairment

This section describes the process of viewing the history of an impairment.

To view the history of an impairment:

1. Click **Impairments**.
2. Using the search filters, locate and click the impairment you want to view the history of.
3. Scroll down and click the **History** section to view.

Tenant Communications

The Tenant Communications section allows you to send Broadcast messages, post announcements, and post photos to your Building Connect site, all from your mobile device. This section describes the process of each while in the mobile application.

Sending a Broadcast Message

The Broadcast module allows you to send emergency and non-emergency messages to selected groups of recipients. This section describes the process of sending a Broadcast message. Note: Some functionality will require a subscription to Send Word Now to access. For more information on SWN, contact your Client Account Manager.

To send a broadcast message:

1. Click **Tenant Communications → Send Broadcast Message**.
2. To select your recipients:
 - a. Select a **Building**.
 - b. (Optional) Select a **Group**.
 - c. (Optional) Enter additional emails by clicking **Add More Emails**, entering them into the provided field, and clicking **Done**.
3. Select your **Delivery Options**. Note: Multiple options can be selected.
4. Select your **Message Content** via one of two methods:
 - a. **Template**: Broadcast templates can be created via the desktop version and then accessed via the mobile application.
 - b. **Create a Message**: This option allows you to create a new message via the mobile application.
5. (Optional) If you subscribe to Send Word Now, use the **Request Responses** field to enter your recipient response options.
6. (Optional) To add a photo to the Broadcast message, click **Add Photo**.
 - a. Choose to **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.
7. Click **Use Photo**.
8. (Optional) Enter in a comment to accompany the photo.

9. Click **Save**.
- 10.(Optional) If you subscribe to Send Word Now, click the **Track Message views/responses** to monitor responses from your recipients.
- 11.Click **Send Message**.

Posting an Announcement

The Announcements section allows you to post Standard messages, Emergency messages, and Events to your tenant portal via the mobile application. This section describes the process for creating an announcement.

To post an announcement:

1. Click **Tenant Communications → Post Announcement**.
2. Select a **Building**.
3. Enter a **SUBJECT**.
4. Enter your **ANNOUNCEMENT** message.
5. Select one of the following types of messages:
 - a. **Standard Message**: Messages appear in the **Messages** section of the tenant portal.
 - b. **Emergency Message**: Similar to a regular message, however, emergency messages are also denoted with a red flag and posted for a designated date range.
 - c. **Event**: Similar to a regular message, however, events are also denoted with a calendar icon and posted for a designated date range.
6. Click **Post Announcement**.

Posting a Photo to Building Connect

This section describes the process of posting a photo to one of your Building Connect sites from the mobile application.

To post a photo to a Building Connect site:

1. Click **Tenant Communications → Post Photo to Building Connect**.
2. Select a site to upload the photo.
3. Select the photo gallery that you want the photo to appear in.
4. Click **Add a Photo**:
 - a. Choose to **Take Camera Photo** or **Add From Gallery**.

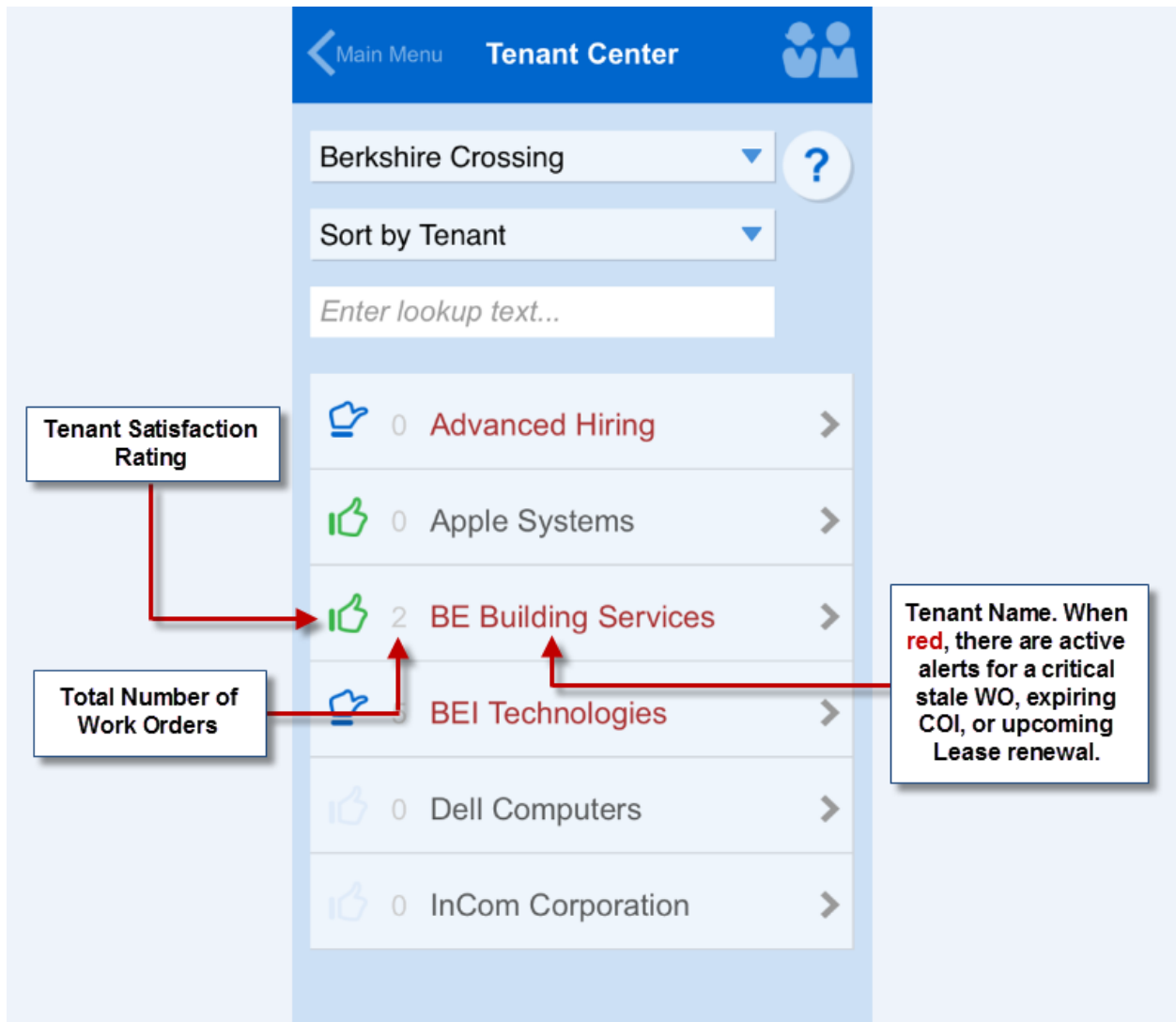
- **Take Camera Photo** enables your smartphone's integrated camera.
 - **Add From Gallery** allows you to access a previously taken photo from your smartphone's photo gallery.
- b. Click **Use Photo**.
 - c. Click **Save**.
5. Enter a **DESCRIPTION** of the photo.
 6. Click **Upload Photo**.

Tenant Center

The Tenant Center provides important, real time, information about the tenants in your building. Using this section of the mobile application, you can see a tenant’s Satisfaction Rating, Work Order count, COI and Lease status, Employee information, and any relevant Documents or Notes associated to the tenant.

To access the Tenant Center, click **Tenant Center**.

The following illustration provides a definition for each of the Tenant Center’s components.

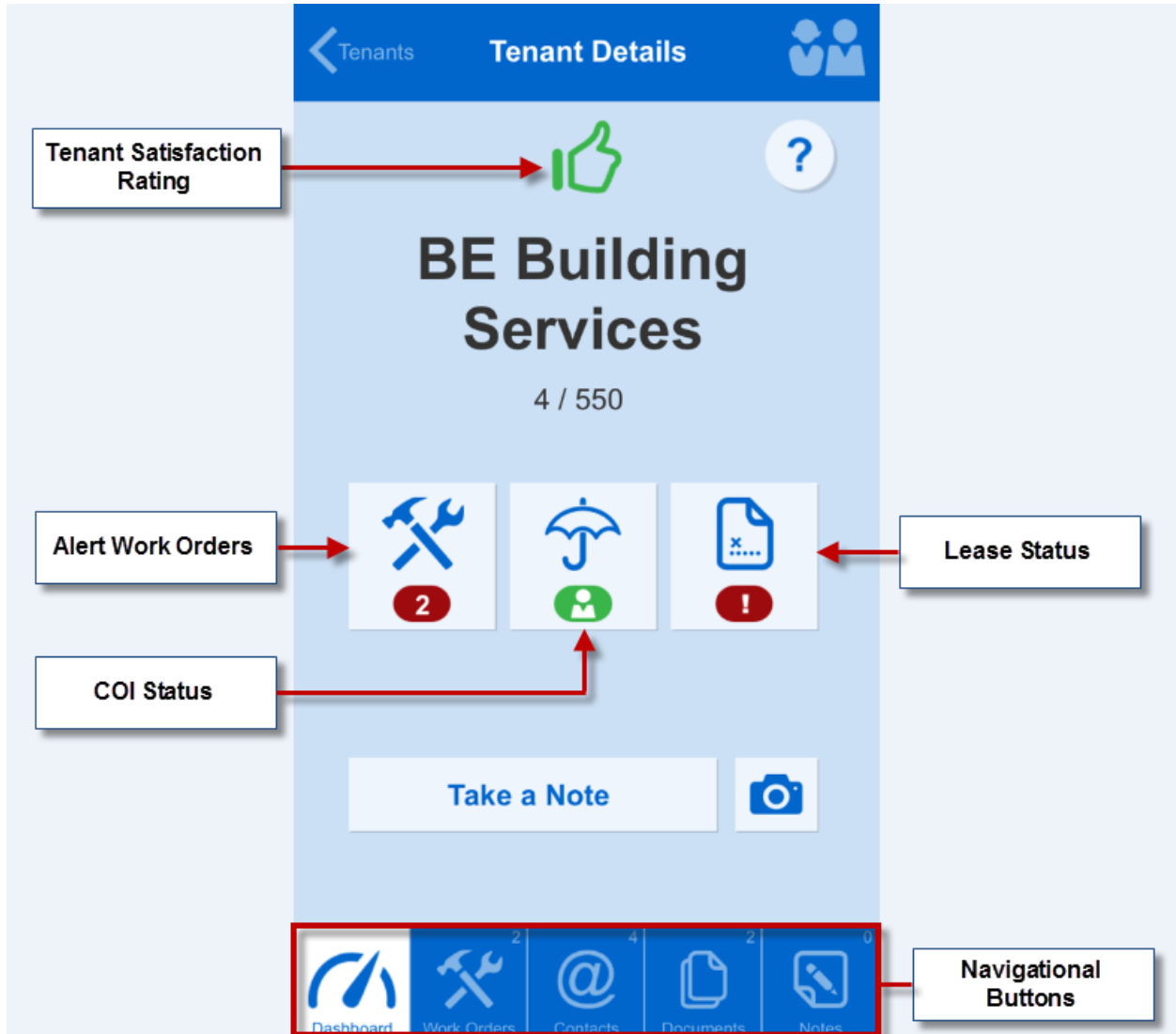


Navigating the Tenant Dashboard

The Tenant Dashboard located in the mobile application allows you to quickly access a specific tenant’s information.

To access the Tenant Dashboard, click **Tenant Center** → Select a **Tenant Company** from the list.

The following illustration provides a definition for each of the Dashboard’s components.



Time Cards

The Time Cards module gives employees the ability to log their labor hours via the mobile application. *Note: Time Cards must be configured using the desktop version of the application.* After access is provided, employees have the ability to distinguish between standard hours, overtime, or additional times such as vacation and sick time.

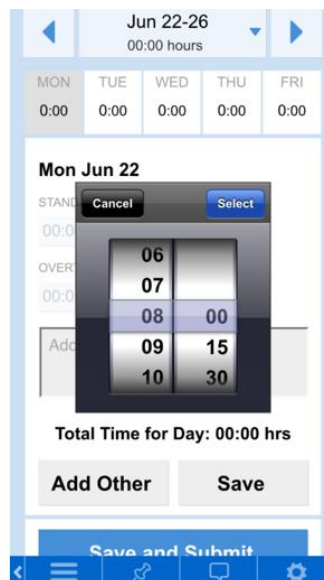
This section describes how to enter time on a Time Card via the mobile application.

Entering Time on a Time Card

This section describes the process of entering time on your time card using the mobile application. **WARNING:** *You must log hours for each day of the week that you work. Failure to log and save your hours daily will result in a loss of hours for that particular day.*

To enter time:

1. From the Home Screen of the mobile application, click **Time Cards**.
2. Select the week you want to enter time for. *Note: To enter time for another week, click the date dropdown or the left/right arrow located next to the week range.*
3. Click the day of the week you want to add time to.
4. Click the **STANDARD TIME** field.
5. Use the scroll wheel to select the hours and minutes, and click **Select**.



6. (Optional) To add Overtime, click the **OVERTIME** field, and enter your time using step 5 above. *Note: A comment may be required when Overtime is entered.*

7. (Optional) Some accounts may elect to track additional types of time such as vacation or sick time. To enter time other than Standard or Overtime:
 - a. Click **Add Other**.
 - b. Select the **TYPE** of time you want to add.
 - c. Click the **TIME** field.
 - d. Use the scroll wheel to select your hours and minutes, and click **Select**.
8. Click **Save** to enter your time.
9. (Optional) Repeat Steps 3-8 for the rest of the days of the week.