Angus AnyWhere®

Tenant Service Request

User Guide

Table of Contents

Introduction to Tenant Request

Angus AnyWhere® Tenant Request (TR) is a fully Web-enabled system designed to manage and streamline the work order completion process.

A request is created when a tenant has a need for service. Requests are converted automatically by Angus AnyWhere into TR work orders. Tenants are able to make requests using their Service Portal; they can also be made by employees on a tenant's behalf from within Angus AnyWhere or using Angus AnyWhere Mobile.

The TR work order system has the following features:

- If sufficient information is provided in the original request, the work order can be automatically assigned and dispatched using the routing table (for more information on work order routing, see About Work Order Routing and associated topics). Otherwise, the work order is placed in the Outstanding list, where an Administrator may complete the details necessary to assign and dispatch the work order.
- Tenants can request and receive estimates for billable services.
- An optional Service Rating feature can be enabled, allowing tenants to rate the quality of service they receive. Employees can view a summary of this feedback via the "Service Rating" Dashboard component, and drill down to ratings on specific completed work orders.
- Employees can subscribe to TR email notifications in Angus AnyWhere. Tenants can subscribe to TR email notifications in their Service Portal.
- Employees (or vendors assigned to a work order) can update the work order status.
- For work orders that were completed by a vendor or other third-party, these work orders can be flagged as Invoice Pending.
- Closed work orders that contain billable services must undergo billing verification.

To get started configuring the TR system, start with Configuring Tenant Request. For information on using the TR system once it has been configured, see Tenant Request Workflow and associated topics and subsections.

Tenant Request Workflow

The generic workflow for a TR work order is listed below. Note that some of the steps outlined (such as adding billable services) do not have to occur in the exact order shown. Some additional steps may be taken regarding the work order's history (such as if a work order is delayed, reassigned, etc).

1. A tenant makes an initial request (or an employee proactively enters a request).
2. The request is received by Angus AnyWhere and automatically creates a work order, or an employee creates a new work order in Angus AnyWhere on behalf of the tenant.
3. Depending on the information entered into the work order and your work order routing settings, the work order is either automatically assigned, or an employee must manually assign the work order.
4. If the tenant requested an estimate, an estimate is created and sent to the tenant for approval (work is not started until the estimate is approved).
5. If the Cancel Service Request feature is enabled for the request type, the Tenant Contact will be able to cancel the request as long as a **Work Started** event has not been applied.

It is important to note that when the Cancel Service Request feature is enabled, **work orders should always have a Work Started event entered as soon as work begins.** This will prevent a situation where a tenant can cancel the Service Request after work has already begun.

6. Work is started.
7. Work is completed.
    - If the Service Rating feature is enabled on the property and has been configured, then the Service Rating Workflow is initiated at this time. For additional details, see the *About Service Rating* topic and associated sections in our Online Help, or in the *Tenant Request Setup Guide* PDF.
8. Any billable services are added.
9. If no invoices are pending, the work order is closed.
10. If billable services were added to the work order, billing verification is conducted.

About Geo Dispatch

The Geo Dispatch feature displays a map that allows Tenant Request (TR) work orders to be manually dispatched to employees based on their current (or most recently known) location. Participating employees must have the Geo Dispatch feature enabled on their Angus AnyWhere Mobile app, and must remain logged in. Employees are able to set up their shift hours, and can indicate if they are currently available, unavailable, or on break, in order to assist with the proper assignment of new work orders.

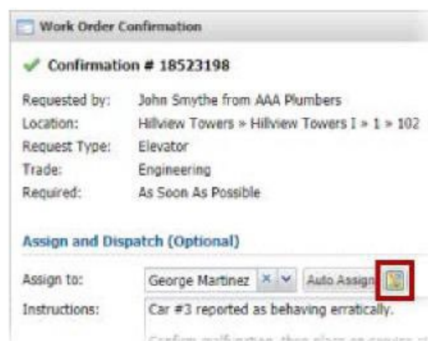
- For additional details on configuring the Angus AnyWhere for iOS® and AndroidTM mobile app, see Configuring Geo Dispatch.
- For information on accessing and using the Geo Dispatch feature in Angus AnyWhere, see the [Assigning Work orders with Geo Dispatch](#) topic below.

Assigning Work orders with Geo Dispatch

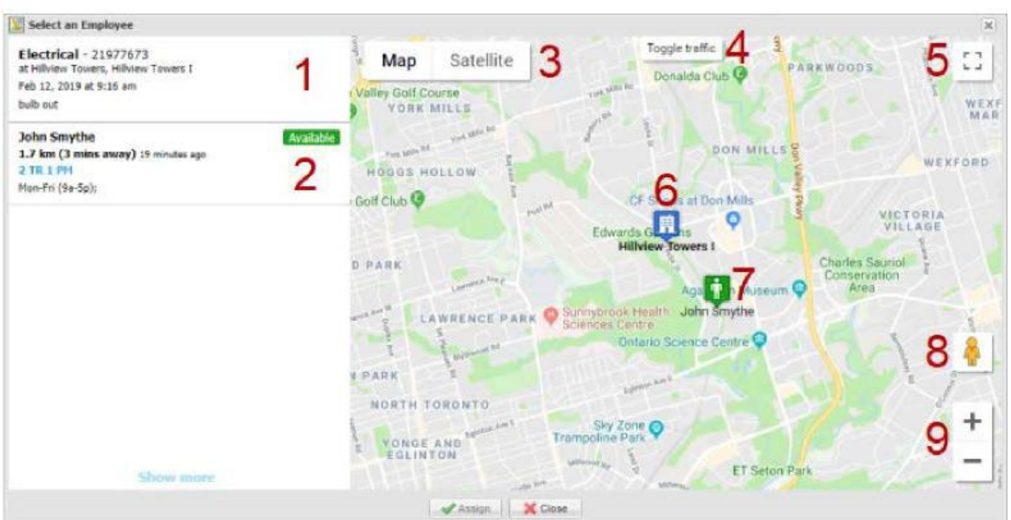
When the Geo Dispatch feature is enabled for a building, work orders for that building will have a **Geo Dispatch** ( ) button. This button is displayed beside the **Auto Assign** button on the confirmation screen for new work orders, and in a work order's details when editing the **Assigned To** field under the Workflow tab.

Work order details - Assign and Dispatch popup

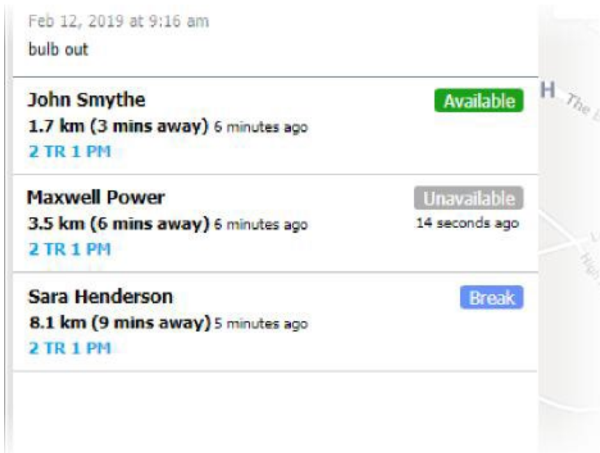
New work order confirmation screen



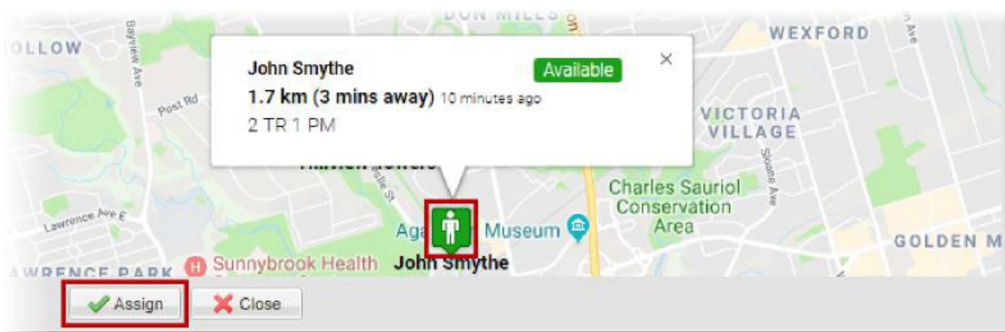
Clicking the Geo Dispatch button will open the Geo Dispatch assignment popup. An overview of the interface's functions and options are detailed below.



1. The first entry on the left contains basic details of the work order, as a reminder of the work order that is being assigned (as shown below).
2. Beneath the work order details, a list of employees with the Geo Dispatch feature enabled are shown, including their relative distance from the building, any relevant shift information, their status (**Available**, **Unavailable**, or **On Break**), and how many Preventive Maintenance (PM) and Tenant Request (TR) work orders have already been assigned the employee.
    - Only the closest ten (10) employees are displayed initially in the list. Additional employees can be viewed by clicking the **Show More** link at the bottom of the list.



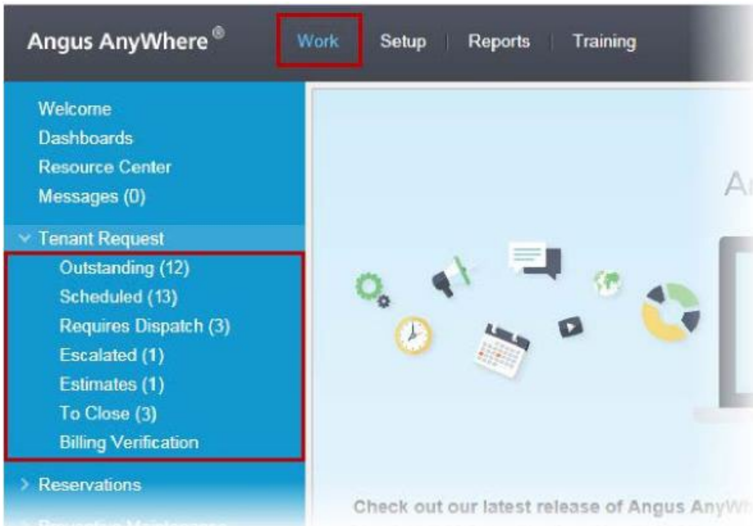
    - Clicking on an employee on the list will highlight their location on the map and enable the **Assign** button at the bottom of the screen.



3. You can use the **Map** and **Satellite** buttons to switch between a standard map view and a satellite overlay.
4. The **Toggle Traffic** feature enables a color-coded overlay on roads, indicating high- and low-traffic areas.
5. The **Toggle Fullscreen** button will expand the map to fill the entire screen. While in fullscreen mode, the employee list on the left will not be visible.
6. The work order location (building) is displayed.
7. The location of each employee is displayed on the map. Similar to clicking on an employee on the list to the left, clicking on an employee's icon on the map will provide you with the option of assigning the work order to the employee (as shown in 2, above)
8. You can drag-and-drop the "Pegman" to enable the Google Street View function at the location the Pegman is placed.
9. Use the **Plus** (+) and **Minus** (-) buttons to zoom in and out on the map.

Tenant Request Lists

The Tenant Request (TR) lists can be accessed in Angus AnyWhere® by clicking on **Work**, then clicking on a specific TR list as shown below.



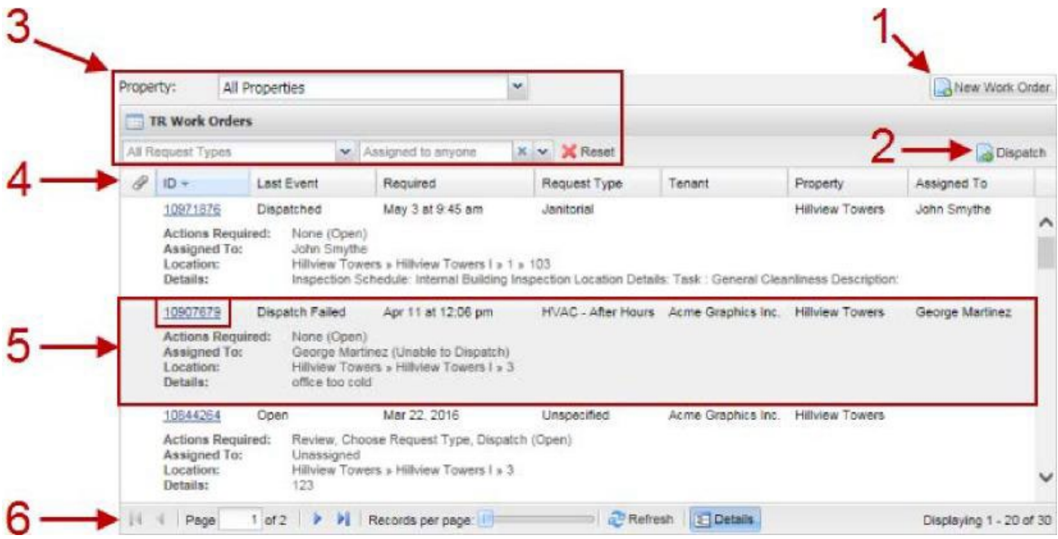
- The Billing Verification list does not share the common features mentioned below. For specific details, refer to The Billing Verification List topic.
- For an overview of a work order's life cycle (workflow), see Tenant Request Workflow.
- If you are experiencing issues locating a specific work order, or are trying to locate a closed work order, you can find it using the advanced search option in Angus AnyWhere, as described in Finding TR Work Orders.

Each TR list displays work orders that fall under a specific classification or state in the work order life cycle, as described below. For detailed information on functions that are common to all lists, see Common Features below.

- **Outstanding:** The Outstanding list provides a general overview of all work orders that are currently outstanding and have not yet been completed. Depending on the specific status of a work order, it may also appear in the Scheduled, Requires Dispatch, or Estimated list.
- **Scheduled:** The Scheduled list displays all TR work orders where the required completion date is set in the future.
- **Requires Dispatch:** The Requires Dispatch list contains work orders that need to be dispatched; work orders in this list may also require assignment before they can be dispatched.
- **Escalated:** This list displays all work orders that have escalated.
- **Estimates:** This list displays work orders that either require an estimate, or have an estimate attached to them.
- **To Close:** The To Close list displays all work orders where work has been completed but have not yet been closed. This list also includes a **Pending Invoice** column that can be used to sort the list.
- **Billing Verification:** All work orders that require billing verification are displayed in this list. This list does not share the features mentioned below. For specific details, refer to The Billing Verification List topic.

Common Features

A number of features are common to all Tenant Request lists. These common features and any applicable exceptions are highlighted and detailed below:

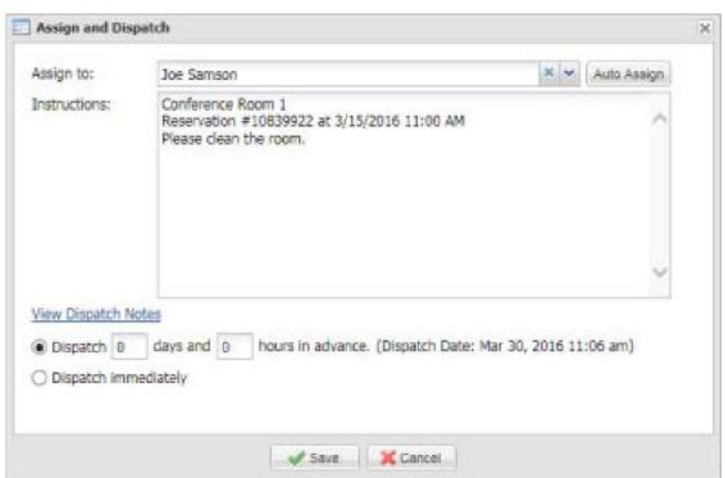


1. You can create a new Tenant Request work order from any list except for the Billing Verification list by clicking **New Work Order**. For additional details on creating a TR work order, see [Adding a TR Work Order](#).

2. Selecting a work order and clicking **Dispatch** allows you to do any of the following:

The **Dispatch** button is replaced by a **Pending Invoice** button on the To Close list. For additional details, see [Work Orders With Pending Invoices](#).

- Manually assign or reassign a work order
- Automatically assign a work order using the **Auto Dispatch** button, if Work Order Routing has been configured for the work order's request type
- Update the instructions for the work order
- Dispatch or redispatch the work order



3. All lists can be filtered using the Property drop-down list. All lists except for the Billing Verification list can also be filtered by Request Type and the assigned employee or vendor.

4. All lists have a non-sortable Attachments column ( ). This is used to indicate if the work order has one or more file attachments.

   Each list can be sorted by ID, Required Date, Request Type, Tenant, Property or assignment (Assigned To) by clicking on the appropriate list heading. There is also at least one additional sortable field in each list type:

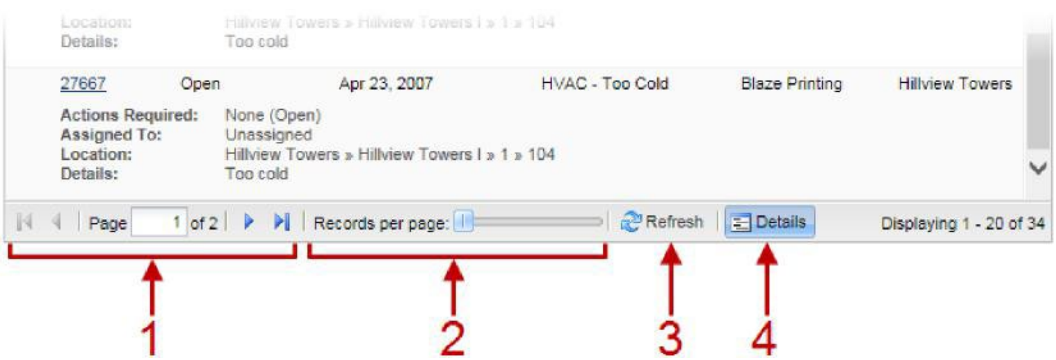
List	Additional Field
Outstanding	Last Event
Scheduled	Received
Requires Dispatch	Last Event
Escalated	Escalation Level
Estimates	Estimate Status
To Close	Last Event, Pending Invoice ( )

5. You can view and update the status of a work order's details by double-clicking on a row or clicking on the work order number. This will take you to the work order details screen; for additional information, see Updating Work Order Details.

6. Additional list controls are provided at the bottom of the list, allowing you to modify the number of work order displayed per page, switch between pages, and more, as described in the List Controls section below.

List Controls

Additional controls are located at the bottom of each list, as shown below:



1. Lists are paginated; when there are more work orders in the list than can be shown on a single page, the **Page** controls allow you to switch between pages in the list.

There are three ways to navigate between pages:

- Type a page number into the **Page** field, then press [Enter] on your keyboard.

- Use the and buttons to go directly to the first or last page, respectively.
- Use the and buttons to go to the next or previous page, respectively.

2. You can adjust the number of work orders displayed on each page by adjusting the records per page slide. You can display between 20 and 100 records per page.

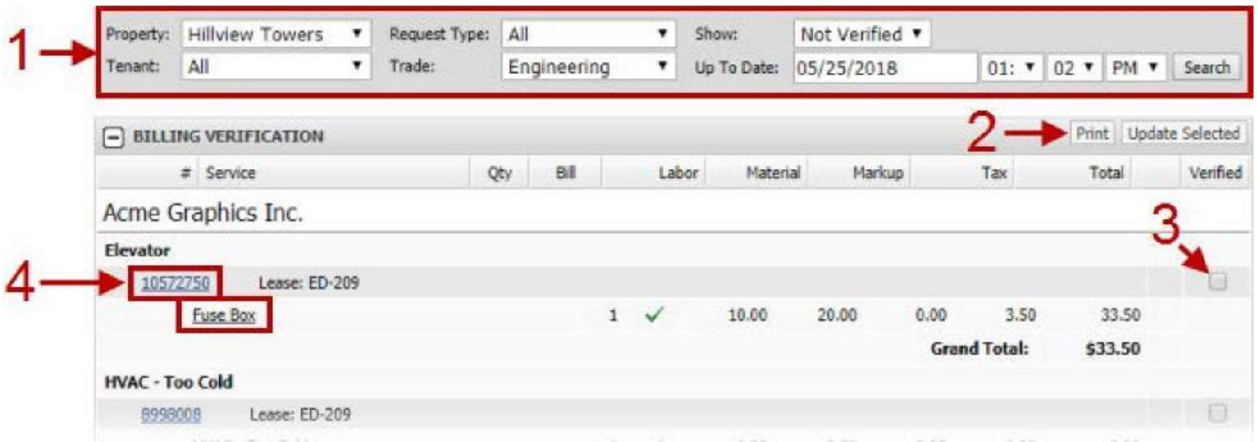
3. All lists automatically update themselves every 90 seconds; however, you can also use the **Refresh** button ( ) to manually update the list at any time.
4. By default, all lists show additional information for each work order entry on a list, such as Actions Required, Assigned To and Location. You can hide or show this information by clicking the **Details** button ( ).

The Billing Verification List

This list is useful for verifying the correctness of data prior to an export of billing amounts to an accounting service. **Only Work Orders that have been marked as Verified** will be marked as Billed in the next export.

The Billing Verification screen displays Work Orders for which all billable services have been entered. The Work Orders appearing on this screen are either Verified or Not Verified. These completed Work Orders can be marked as Verified.

The Billing Verification List's features and controls are detailed below:



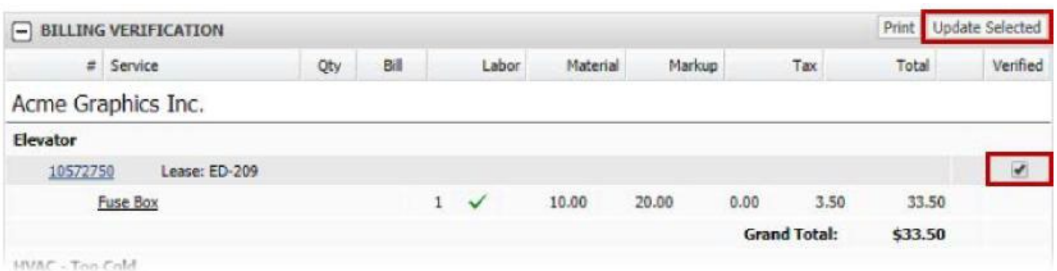
1. In order to assist you in finding specific types of work orders, a variety of filters can be applied to the list:
   - **Property:** indicate which property you are reviewing.
   - **Tenant:** Specify a tenant to filter by, or select **All**.
   - **Request Type:** Select a specific request type, or **All**.
   - **Trade:** Indicate a specific employee role to filter the list by (e.g. Engineering) or **All**.
   - **Show:** Select work orders marked as **Not Verified** (default), **Verified**, or **All**.
   - The **Up To Date** section allows you to restrict the list to only display work orders up to a specified date and time. To apply this list filter, click **Search** after selecting the date and time.
2. The **Print** button can be used to print a copy of the list. The **Update Selected** button is used to update work orders that have the **Verified** checkbox selected, indicating that billing has been verified. It can also be used to unverify a work order that was previously verified. For additional details, see Verifying Work Orders and Unverifying Work Orders below.
3. When checked, this box indicates that billing has been verified. Applying a checkmark is not saved until the **Update Selected** button has been pressed. For additional details, see Verifying Work Orders and Unverifying Work Orders below.
4. To view the original request, click on the work order number. To view the revenue codes and cost codes for each service (if these codes are being used), hover the mouse over the service.

Verifying Work Orders

If a work order is verified in error, you can reverse billing verification for a work order. See Unverifying Work Orders for details.

Work Orders that are billable to Tenants require verification. This can be done on the Billing Verification page. Although billable work orders may be complete, they will not be closed until the billing information has been verified.

1. Locate the desired Work Order from the Billing Verification list.
2. To view the original request, click on the work order number. To view the revenue codes and cost codes for each service (if these codes are being used), place the cursor over the service.
3. Confirm that the billing amounts listed for the Work Order are correct. If there is a problem with the amount:
    - Click the Work Order ID # to view the work order's details.
    - In the Services section of the Workflow tab, Edit, add or remove services as necessary.
    - When you are finished, click **Go Back** (located near the top-left corner of the work order details screen) to return to the Billing Verification list.
4. Click the **Verified** checkbox next to the work order(s) you would like to verify, then click **Update Selected**.



5. In the confirmation popup, click **Yes** to finish verifying the Work Order.

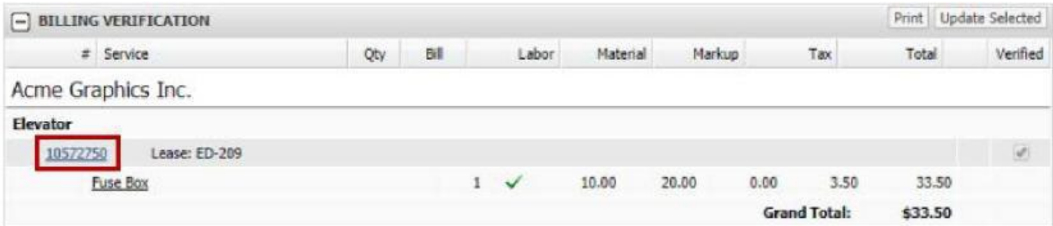
Unverifying Work Orders

If Angus AnyWhere® is integrated with your accounting system, a reverse button is available on the Edit Work Order screen. Click this if incorrect services have been added. This action will appear as a new history entry.

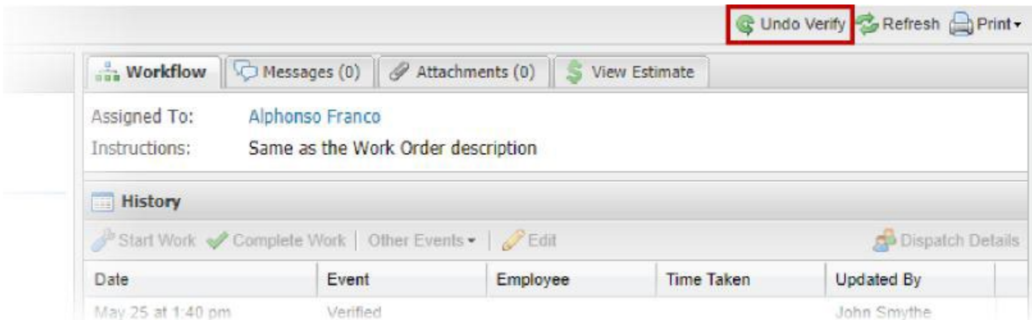
If billing was verified in error on a work order, you can reverse verification of a work order.

1. In the **Show** menu, select **Verified**.

2. A list of verified work orders are displayed. Click on the work order number to view the work order's details.



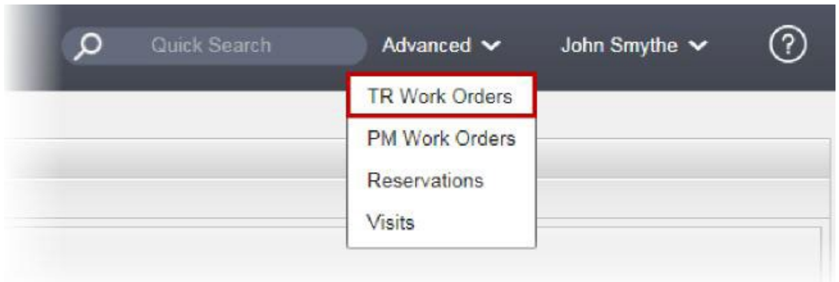
3. Click **Undo Verify**, located near the top-right corner of the work order details screen. Billing is no longer verified and the work order's status is reverted to Closed.



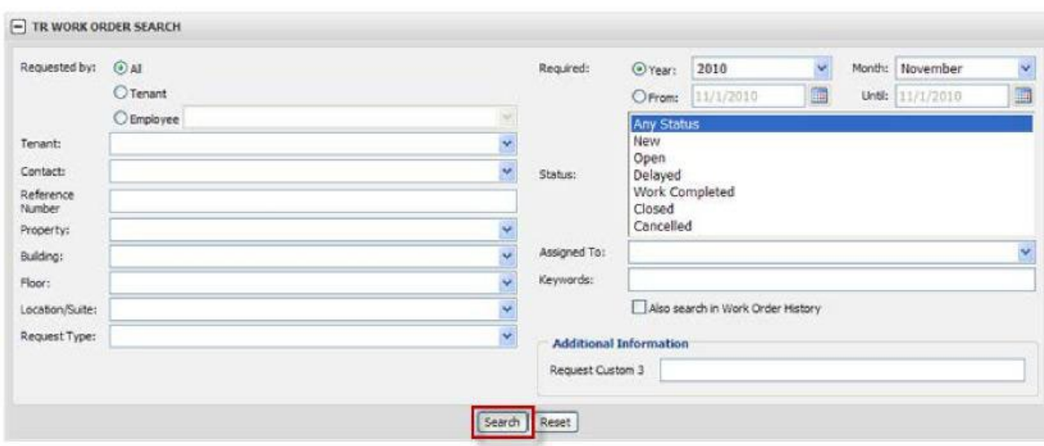
Finding TR Work Orders

If you do not know the Work Order number, you can use the Advanced Search function, as detailed below:

1. Click the **Advanced** menu and select **TR Work Orders**. The TR Work Order Search screen is displayed.



2. Enter any available information about the Work Order. Information that can be provided to assist with the search includes:
   - The requestor (all, tenant, or employee name)
   - Tenant, Tenant Contact
   - Location (Property, Building, Floor, Location/Suite)
   - Request Type
   - Required completion date (a specific month and year, or a date range)
   - Status
   - Assignee (who the work order was assigned to)
   - Keywords (any words used in the work order that might distinguish it from other work orders)
3. Click **Search**. A list of work orders that match your search criteria are displayed.



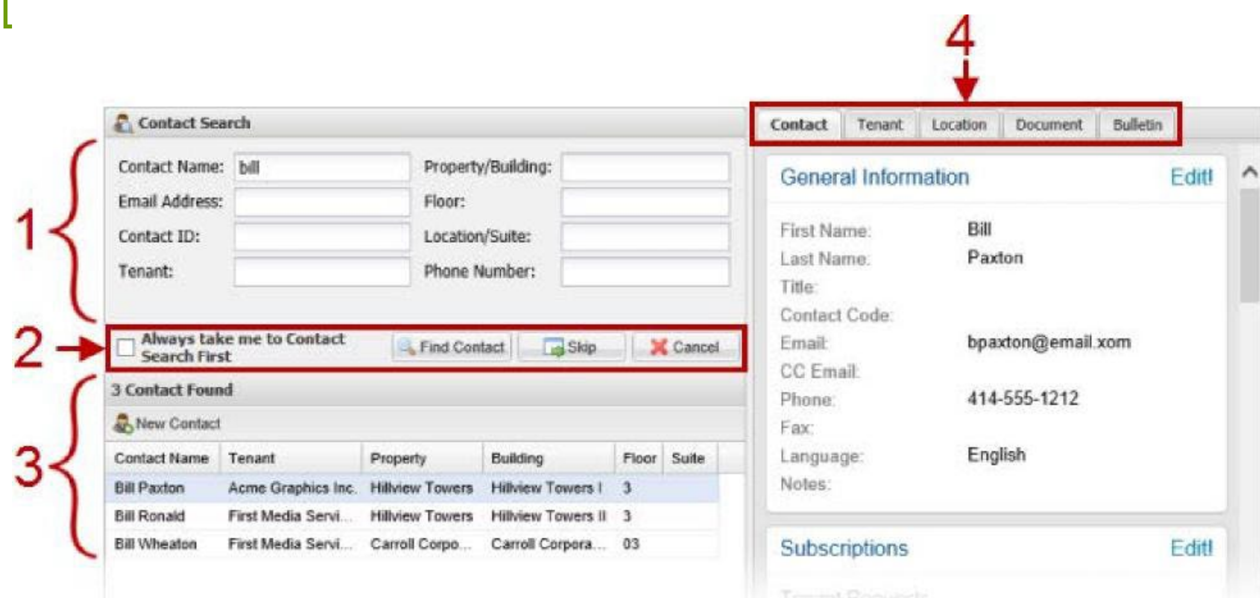
The Contact Search Screen

If you are creating a Resource Reservation, see Reserving a Resource instead.

The Contact Search screen allows you to search for the Tenant Contact associated with a new Tenant Request that is being entered into the system. This screen is displayed as a first step when creating a new Tenant Request work order if your account has Call Center Mode enabled, or if you manually navigate to the screen by clicking the **Contact Search** link on the New TR Work Order screen.

The Call Center Mode setting can be turned on or off from My Profile, located in the General Information card.

The features and options available on the contact search screen are detailed below.



1. Enter information into one or more contact search fields to locate a tenant contact. To search for a contact, you must either:
   - Enter at least 3 characters into one of the search fields; or
   - Enter at least 3 digits into the phone number field.
2. In this section you can choose from the following options:
   - If Call Center mode is enabled for your account, **Always take me to Contact Search first** is checked. If you would always prefer to skip this step and go straight to the New TR Work Order screen, you can remove this checkmark. Please note that checking or unchecking this option will also enable or disable Call Center mode on your account.

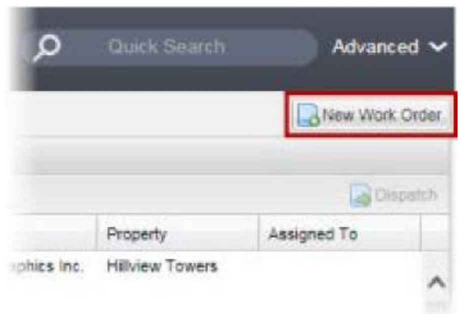
- If you have entered contact search information as described in Section 1 above, then clicking **Find Contact** will begin the search process. Any potential matches for your search criteria will be displayed in a list, as described in Section 3, below.
- If you would like to skip this step, click **Skip** to go to the New TR Work Order screen. Using the **Skip** button does not disable Call Center mode.
- Click **Cancel** if you do not want to create a new Tenant Request work order at this time. You will be returned to the Tenant Request list that you were previously viewing.

3. This section displays the results (if any) of your contact search. By default, the first entry of the search results are selected.
    - If the contact you were looking for is not found, or if your search does not display any results, you can either re-check your search criteria and try again, or if you are certain the contact does not exist, you can click **New Contact** to create a new contact.
    - Click on a contact in the list to display the contact's details in the tabbed section to the right. This section of the screen is further described in Section 4, below.
    - Double-click a contact to proceed to the New TR Work Order screen using that contact's information. See Adding a TR Work Order for additional steps on creating a Tenant Request work order..
4. Once a contact from the search results has been selected, the tabbed interface on the right-hand side of the screen displays the following information under each tab:
    - **Contact**: The contact's details are displayed. If needed, you can click on the **Edit** link in any section of the displayed information to update the contact's details, and/or fill in missing information.
    - **Tenant:** Tenant information is displayed for the contact you have selected.
    - **Location:** This tab displays location information related to the tenant contact, such as property and building details, and coverage hours.
    - **Document:** Any content (files or page links) that was added to the Resource Center for the property can be viewed from here.
    - **Bulletins:** If your company uses the optional Bulletins feature, then the Bulletin tab is also displayed. Under this tab, any bulletins associated with the property and/or building are displayed here. If a work order is already associated with a bulletin, that information will also be displayed here.

The New TR Work Order Screen

If your company uses the Bulletins feature, see The New TR Work Order Screen (Bulletins) instead.

The New TR Work Order screen is used to enter the basic details for a new Tenant Request work order. You can start the process of creating a new work order from any of the Tenant Request Lists highlighted below and clicking **New Work Order**. The New TR Work Order screen is displayed.



If you have Call Center Mode enabled, the Contact Search screen is displayed first, which can be used to search for and select a Tenant Contact. See The Contact Search Screen for additional details.

If you have Call Center Mode enabled in your user preferences, you will see a tabbed interface to the right, containing the following information:

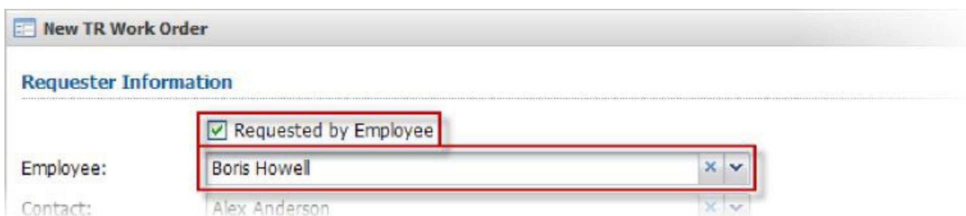
- **Contact**: The contact's details are displayed. If needed, you can click on the **Edit** link in any section of the displayed information to update the contact's details, and/or fill in missing information.
- **Tenant:** Tenant information is displayed for the contact you have selected.
- **Location:** This tab displays location information related to the tenant contact, such as property and building details, and coverage hours.
- **Document:** Any content (files or page links) that was added to the Resource Center for the property can be viewed from here.
- If you also have a **Bulletins** tab, then you should refer to the New TR Work Order Screen (Bulletins) topic instead.

To begin creating a new Tenant Request work order, follow the steps below:

1. If you do not have Call Center Mode enabled in your user preferences, and would prefer to search for Tenant Contact information using the contact search interface, click the **Contact Search** link. See The Contact Search Screen for additional details.

2. If the Work Order has been proactively reported by an employee, click **Requested by Employee**, then click on the drop-down menu and select the employee.

A proactive work order is a work order that was requested by an employee instead of a tenant; i.e., no tenant has requested this work to be performed. **Proactive work orders are still billable.**

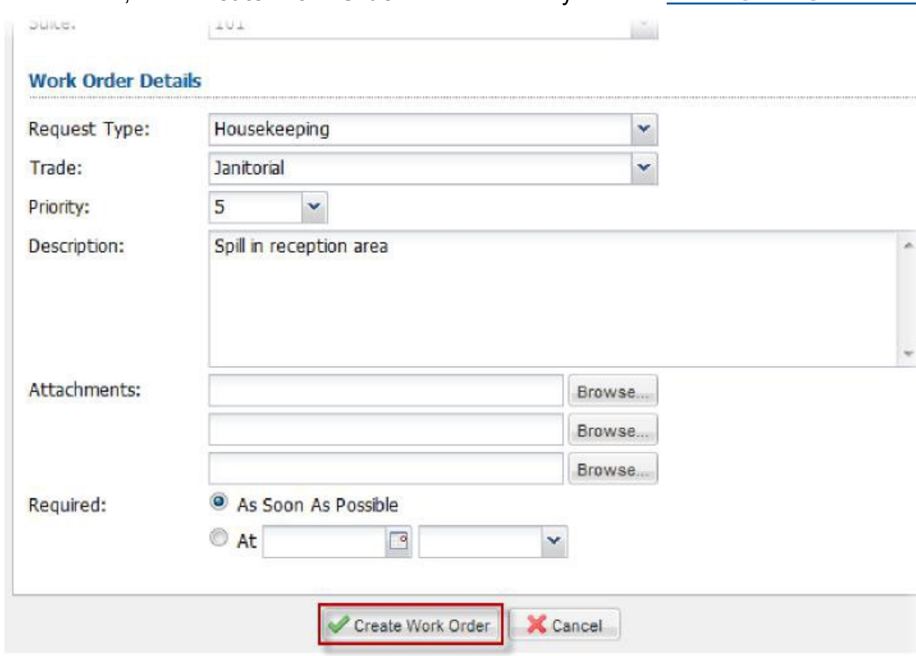


3. If you used the The Contact Search Screen to find the tenant contact, then all required fields for the **Requester Information** and **Work Order** location sections has been pre-populated for you (this information can still be overridden on this screen if necessary). If all pre-filled information is correct, skip to Step 6.

4. Click the contact field and enter the contact's name (this information will already be filled in if you made use of the Contact Search screen described above). After entering at least three letters of the contact's name, you will be presented with a drop-down list of possible matches. Select the appropriate contact from the list.

5. Once a contact has been selected, the Tenant and Work Order Location fields are automatically filled in. If needed, the work order location can be overridden by using the drop-down menus provided.

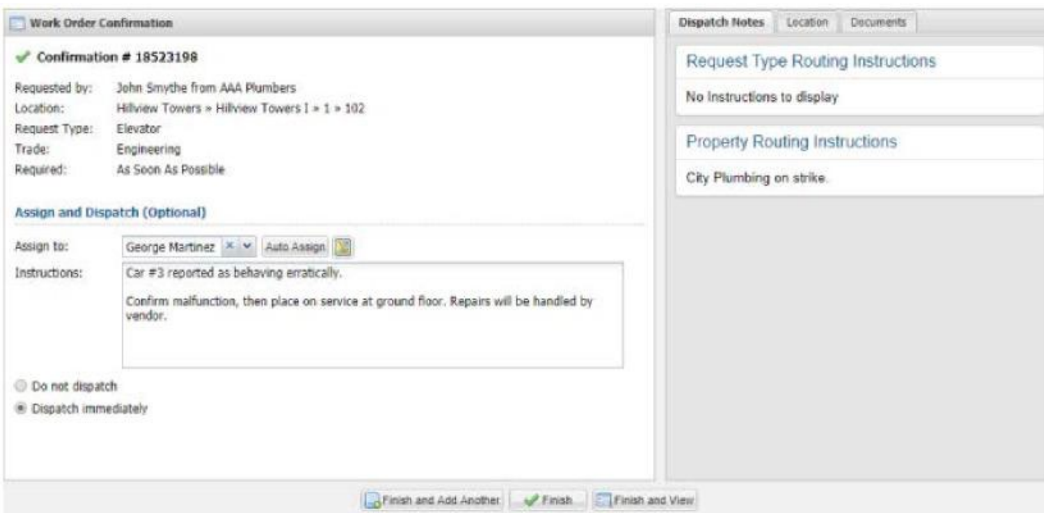
6. If your company uses Bulletins, see Adding a TR Work Order (Bulletins) instead. If you do not use Bulletins, continue following the steps below.
7. Next, scroll down to the Work Order Details section.
8. Using the fields provided, select a **Request Type**, **Trade** and **Priority**.
    - To assist you in finding the correct Request Type, entering a partial name in the Request Type field will display a filtered list. Entering a partial name functions as a "wildcard search", e.g. typing "ele" would match any request type that contains "ele" somewhere in its name.
9. Next, fill in a description for the work order.
10. You can initially add up to three attachments (such as .pdf, .jpg or .doc files) using the **Browse...** buttons to locate files. The total attachment size cannot exceed 10MB; i.e. one file 10MB in size, or 2-3 files whose combined size does not exceed 10MB. For more information on attachments, see About Attachments.
11. In the Required section, select either **As Soon as Possible**, or **At** and use the menus provided to select a date and time that the work is required.
12. When you are finished, click **Create Work Order**. This will take you to the Work Order Confirmation screen.



The Work Order Confirmation Screen

The work order confirmation screen is divided into two sections:

- The main screen displays a short summary of the work order that has been created, and optionally allows you to assign and dispatch the work order, as well as provide additional instructions on the work order.
- A side panel displays additional information in a tabbed interface (Dispatch Notes, Location, Document). The information displayed under these tabs cannot be updated from this location.
    - The **Dispatch Notes** tab displays any request type routing instructions and property-level routing instructions or notes, if any are available.
    - The **Location** tab displays detailed property and building location information, as well as the coverage hours that have been configured for that location.
    - The **Document** tab provides links to any content (files or page links) that were added to the Resource Center for the property, and can be viewed from here.

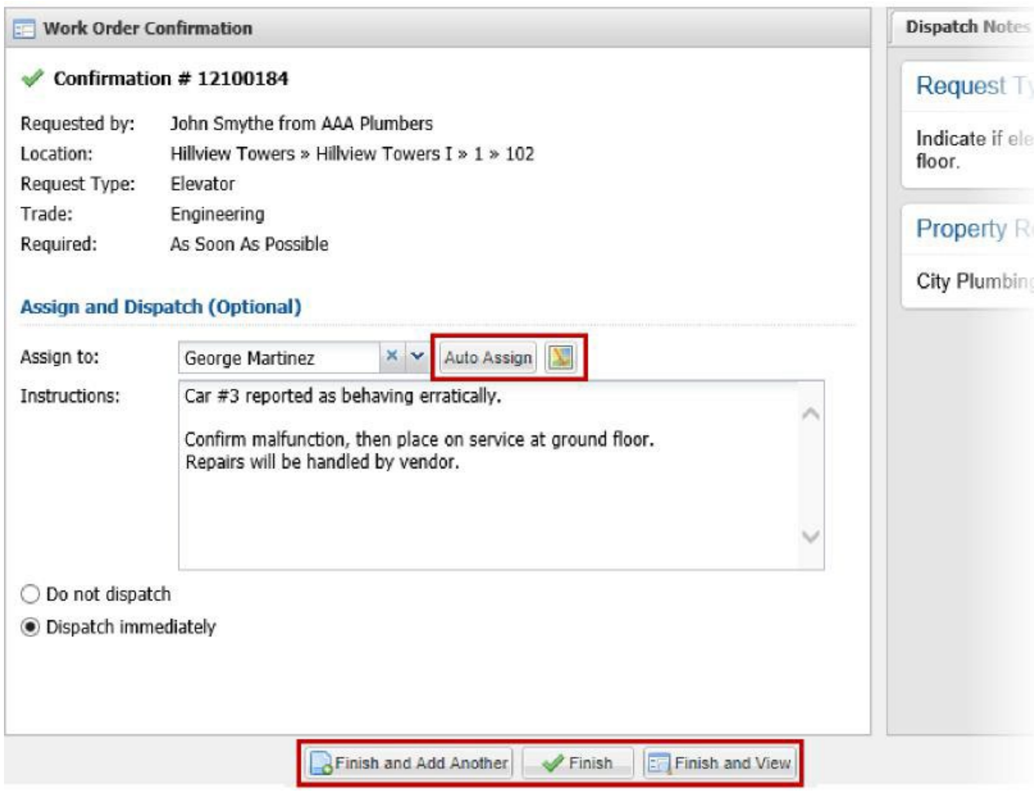


If you do not assign and dispatch the work order on this screen, then it will need to be assigned and/or dispatched manually. Unassigned and/or undispatched work orders are displayed on the Outstanding Tenant Request list.

To assign and dispatch the work order from this screen, follow the steps below:

1. If your building uses the Geo Dispatch feature, you will see a **Geo Dispatch** button ( ) beside the **Auto-Assign** button. Clicking this will allow you to assign the work order to an employee based on their current location. For additional details, see About Geo Dispatch.
2. You can assign the work order from this screen either by selecting an employee or vendor from the drop-down list, or by clicking **Auto-Assign**. The auto-assign feature will attempt to assign the work order based on your routing table.
3. You can review any dispatch notes, location information and shift coverage, and Resource Center downloadable documents related to the property using the tabbed interface to the right.

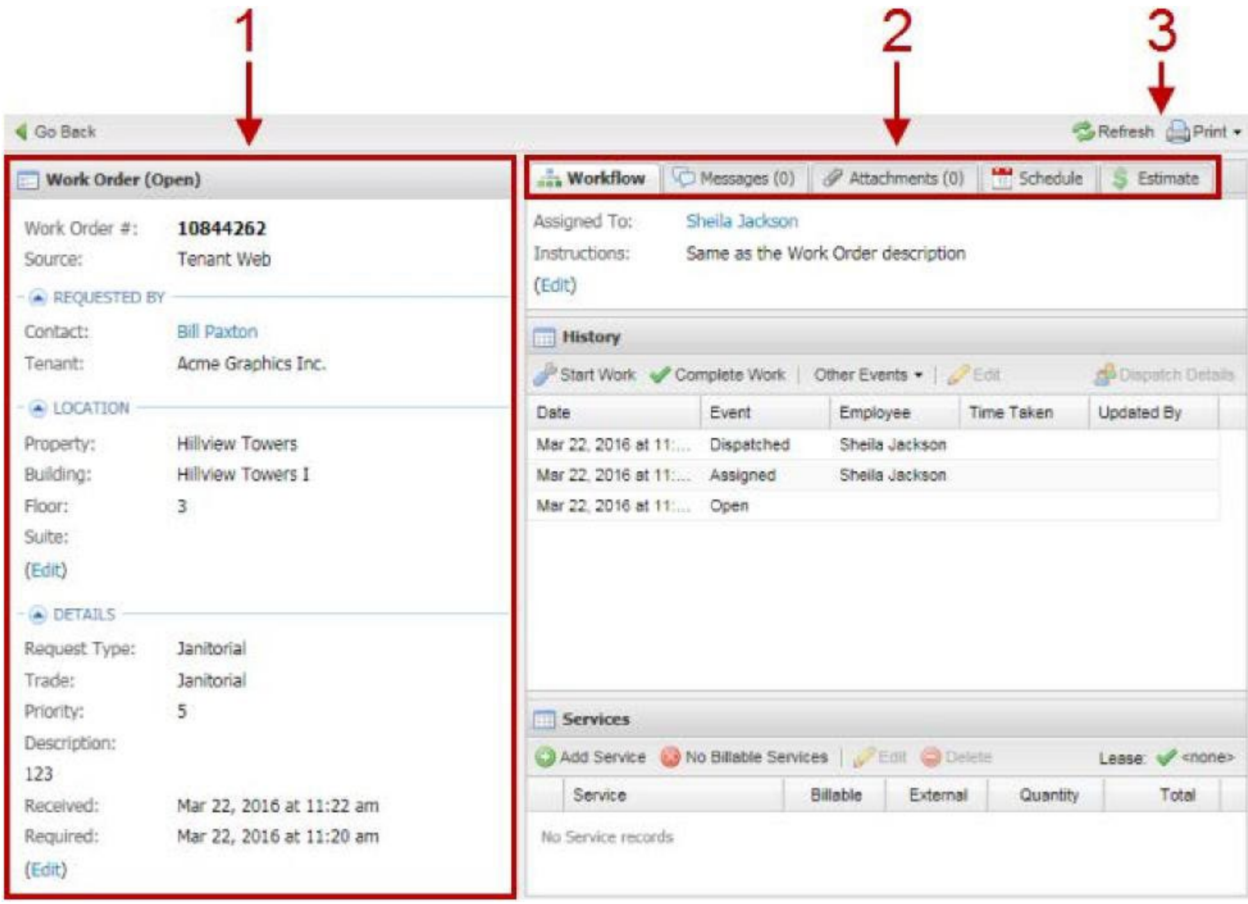
4. Depending on when the work was required, you will have the following dispatch options to choose from:
    - If the work order is required immediately, you can select either **Do not dispatch** or **Dispatch immediately**.
    - If the work order is required at a future date, you can select either to dispatch the work order a certain number of days and hours in advance, or to dispatch immediately.
5. Once you are finished, click one of the following buttons:
    - **Finish** completes the process and returns to the work order lists.
    - **Finish and View** displays the work order's [Details screen](#).
    - **Finish and Add Another** completes the process and returns you to the [New TR Work Order](#) screen. The **Requested by** and **Location** information from the previous work order is reused.



Work Order Details

The Work Order Details screen displays all information related to the work order, including the work order history, file attachments and any estimates associated with the work order.

The following is a basic overview on updating the various sections of a work order. For more detailed information on editing work orders, please refer to the additional linked topics.



1. To the left, the work order details are displayed. To edit a section of the work order details, click on the **Edit** link that corresponds to the section of the work order details which you would like to modify.
   - Hovering your mouse over the **Contact** name opens a popup that displays the Contact's details.
   - Hovering your mouse over the **Property** name displays the property and building location and contact information.
2. On the right, the Workflow tab is selected by default, which displays information concerning the work order assignment, history, and billable services. Additional tabs that can be selected are:
   - The Messages tab displays messages related to the work order that were sent by the Tenant, the employee or vendor assigned to the work order, and Property Management.

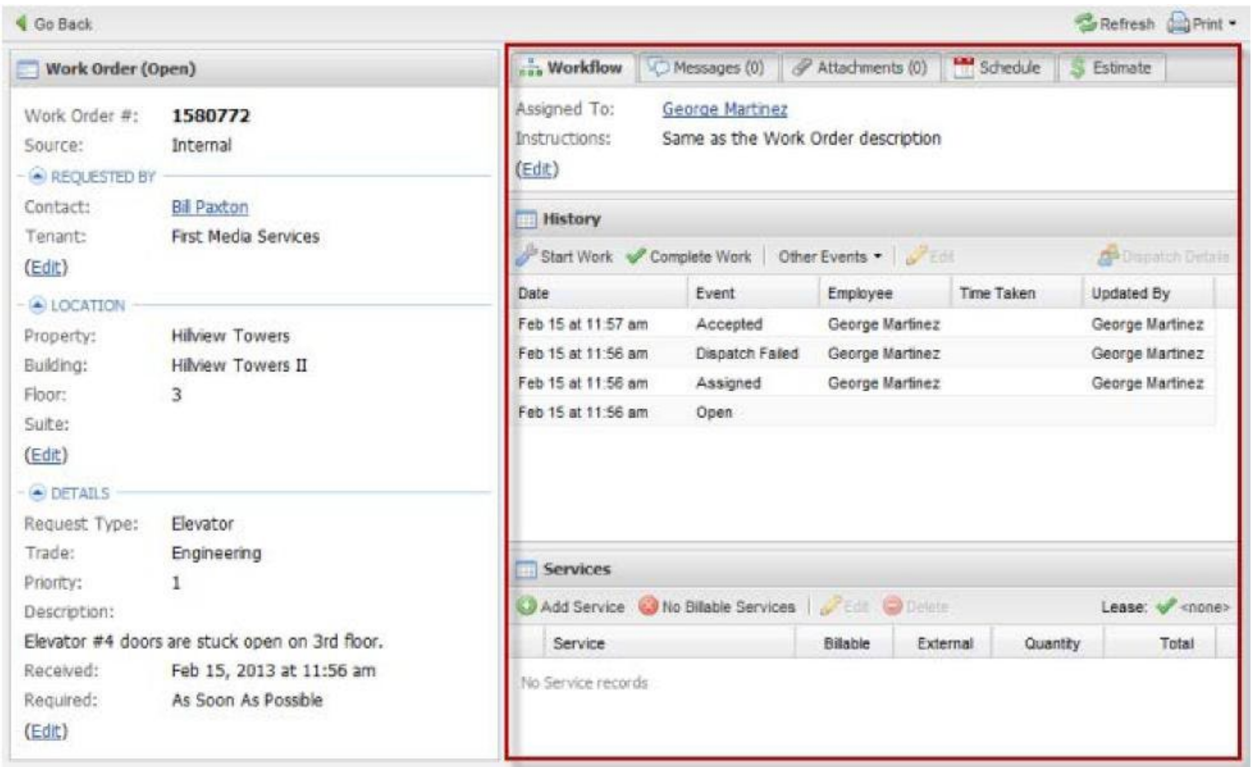
- The Attachments tab allows you add and view files attached to the work order such as pictures, text documents and Adobe PDF files. Tenants using the Service Portal to create a service request can also attach files uppn making their initial request.
- The Schedule tab is used to create or update a recurring schedule that will automatically generate Tenant Request Work orders. This is useful in situations where a tenant has a special recurring need (usually associated with a billable service) that can be easily satisfied by automating work order generation.
- The Estimate tab is used to create a cost-estimate for fulfilling the tenant's request.
These estimates can be viewed and approved by the tenant using their Service Portal.
- The View Bulletin tab is displayed if your company uses the optional Bulletins feature and this work order is associated with a Bulletin. Under this tab, you can view a list of associated tenant requests and work orders. An option to convert the current work order to a request is also available (this option is not reversible).

3. The **Refresh** and **Print** buttons are located in the top-right corner of the screen.
    - Selecting **Print** will print a copy of the work order.
        - If you encounter issues with the printed work order being scaled down in size (making it difficult to read), please refer to our System Requirements topic.
    - Selecting **Refresh** will reload the information in the work order, displaying any changes which may have been made since the time it was originally opened (or last refreshed).
    - Additional buttons (such as Pending Invoice and Close) will be shown in this area once work has been completed.

The Workflow Tab

The Workflow tab, located towards the right of the work order, displays information related to the current status of the work order. The Workflow tab is divided into three sections:

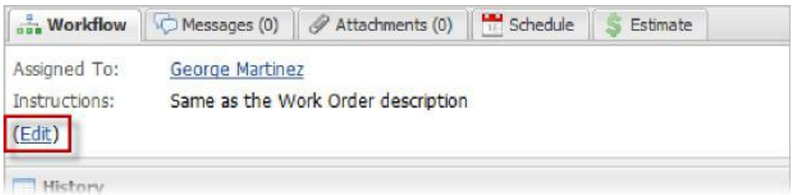
- The Assign and Dispatch section (top) allows you to assign or reassign, dispatch or redispatch work orders and view assignee contact information.
- Update the status of the work order in the History section (middle).
- Use the Services section to add, edit or remove any billable services (bottom).



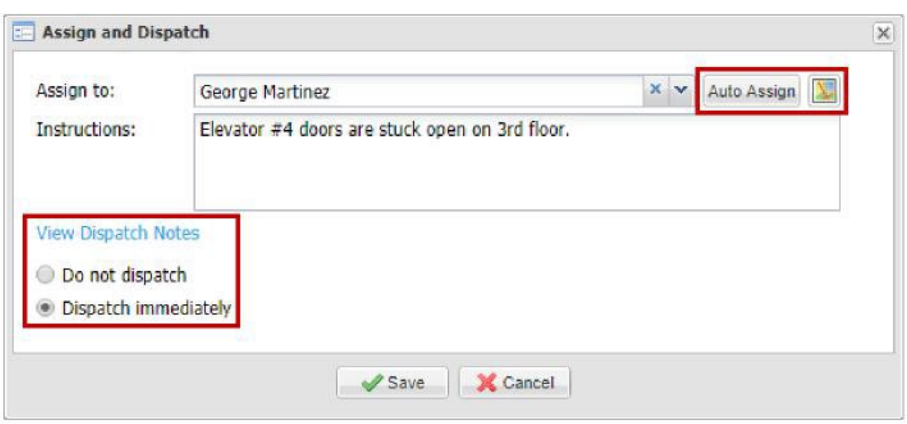
The Assign and Dispatch Section

- Modifying the Instructions field does not alter the Description field in the Work Order Details section.
- You can re-dispatch or reassign a work order by following the steps below. For re-dispatching a work order, make sure **Dispatch Immediately** is selected.

- The Assign and Dispatch section has two fields: Assigned To and Instructions. To modify this information or to re-dispatch a work order, click the **Edit** link. A popup window will open.



- You can assign, reassign or redispatch the work order by either using the drop-down menu provided, by clicking **Auto-Assign**, or if the feature is enabled on the property, you will see a **Geo Dispatch** option ( ).
    - The **Geo Dispatch** option is used to assign or re-assign the work order to an employee based on their current location. See [About Geo Dispatch] for additional details.
    - The **Auto-Assign** feature uses your routing table to determine the tradesperson or vendor that should be assigned to the work order.
- You can also add or modify the instructions that will appear on the work order. By default, this text will be identical to the Description field in the Work Order Details section, located to the bottom-left of the work order.
- The Dispatch Notes link displays any dispatch notes associated with the property or Request Type. Dispatch notes are not displayed on work orders; they are meant to help provide guidance when assigning work orders. To see the dispatch notes, move your mouse over the link; the notes will appear in a tool tip.
- If an assignment was made, **Dispatch immediately** will be selected by default. If you want to assign the work order but not dispatch it for the moment, select **Do not dispatch**.
- Click **Save**. If you selected **Dispatch immediately**, the work order will be dispatched (or re-dispatched, if the work order had previously been dispatched).



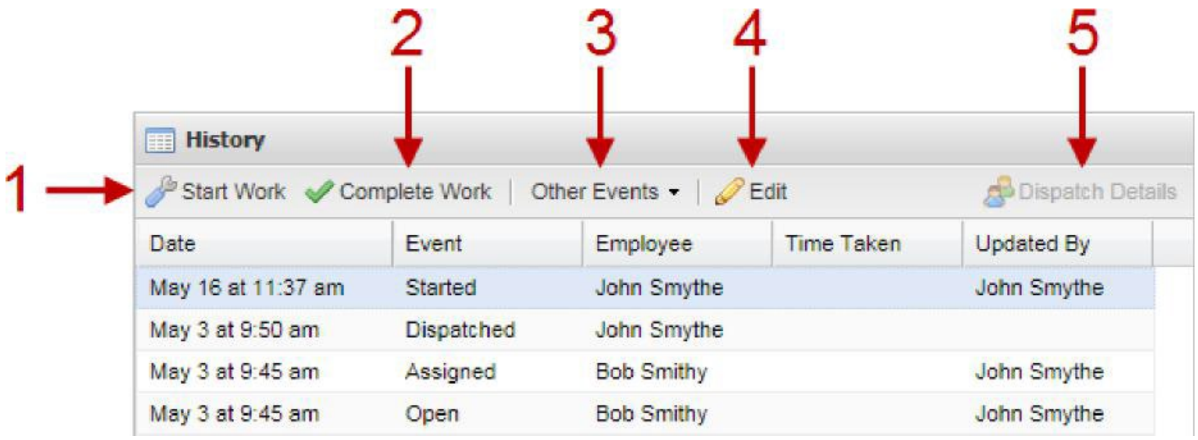
The History Section

For information on employees canceling a TR work order in Angus AnyWhere®, see the Other Events section below.

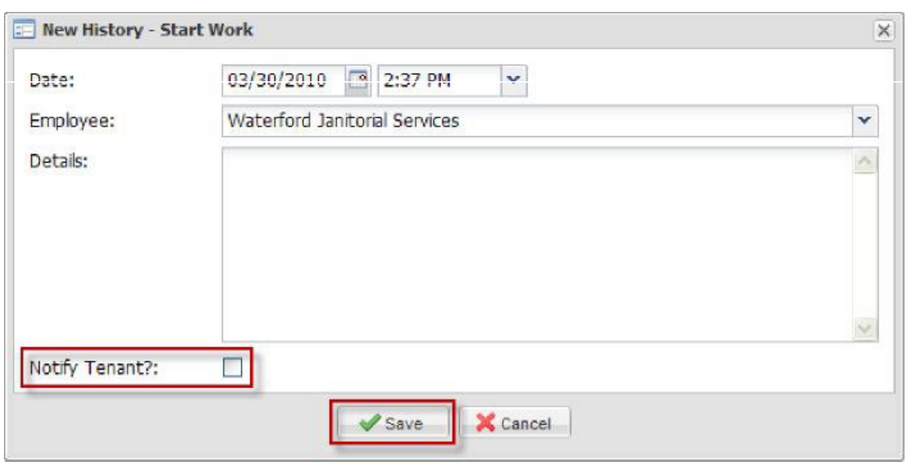
For information on the **Cancel Service Request** feature, which allows tenants to cancel service requests under specific circumstances, see the Cancel Service Request topic.

The History section, located under the Workflow tab, displays a chronological record of events related to the work order's status and allows you to update the current status of the work order. The History section's functionality is detailed below.

For additional information concerning event types, and which events can trigger a tenant notification, see the Event Types and Tenant Notification Events subsections below.



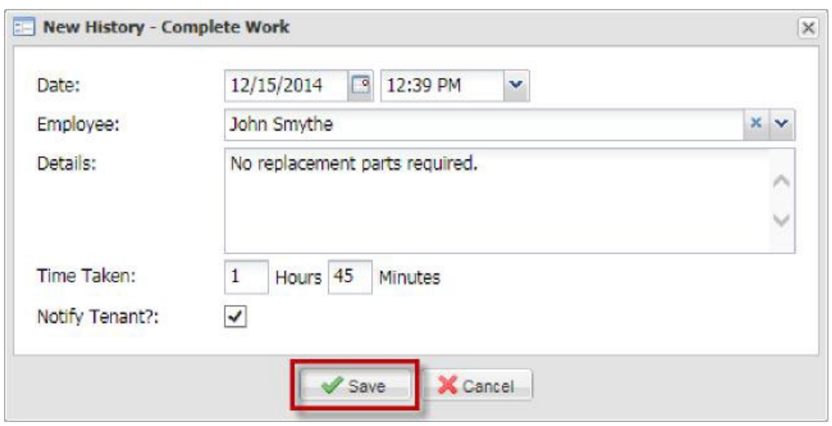
1. To add a Work Started event to a work order using Angus AnyWhere, click **Start Work** in the History section. The New History popup is displayed.



- Using the drop-down lists provided, enter the date and time that work was started. By default, the current date and time is used.

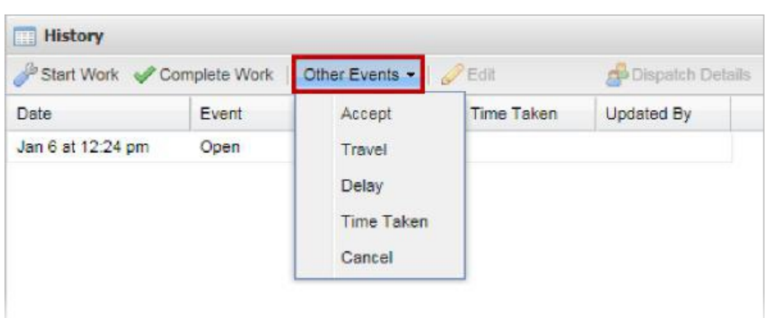
- You can also modify the tradesperson that is performing the work.
- You can add any additional information in the Details section.
- If you would like to notify the tenant that work has started, place a checkmark beside **Notify Tenant**.
- Click **Save** to add the Work Started event.

2. To add a Work Completed event to a work order using Angus AnyWhere®, click **Complete Work** in the History section. In the New History - Complete Work popup that opens:
    - Enter the date and time that work was completed.
    - If necessary, you can also modify the tradesperson that completed the work.
    - You can add any additional information in the Details section.
    - Enter the Time Taken using the Hours and Minutes fields.
    - If a Work Started event was not added beforehand, a Work Started On section is available. Enter the date and time that work was started.
    - By default, **Notify Tenant** is checked. If the tenant does not need to be notified that the work has been completed, remove this checkmark.



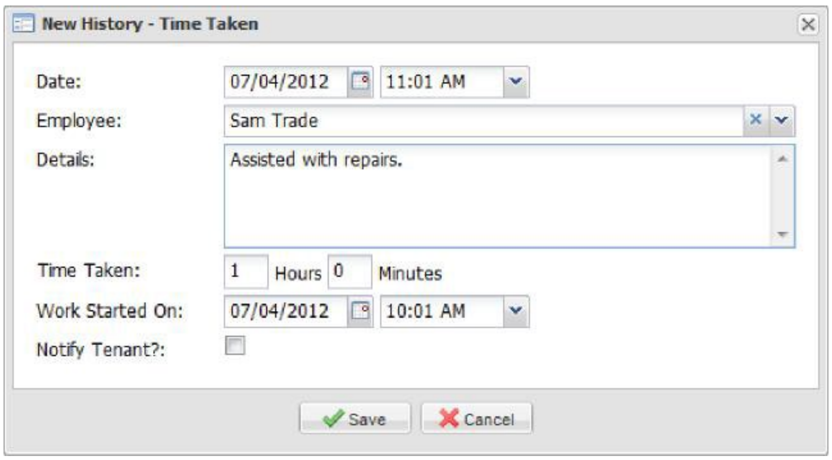
    - Click **Save** to add the Work Completed event. If a Word Started event was not previously entered into the history, it will automatically be added; the details will be calculated using the information entered for the Work Completed event.

3. Other events (Accepted, Travelling, Delayed, Time Taken, Canceled) can be added by clicking the **Other Events** button in the History section of the work order, and selecting an event from the drop-down list.

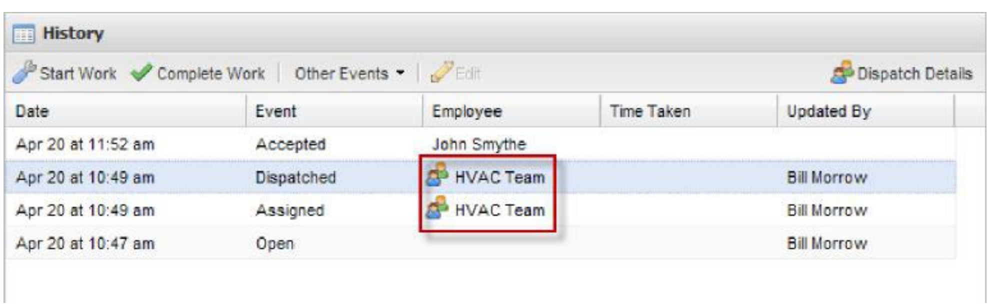


If a **Work Started** event has not yet been added to the work order's history, the **Delay** event will also apply a **Work Started** event. This will ensure that the work order will not trigger level 1 or level 2 escalations (but level 3 escalations can still occur). For more information, see the Escalations topic.

- When entering a **Delay** or **Cancel** event, you will have the option to notify the tenant by placing a checkmark beside **Notify Tenant**.
- The **Time Taken** event type is a generic event type, which can be used to record time taken on a work order that does not fall under any of the other listed event types. You can also use this event type to record work done by a third party (someone other than the person assigned to the work order.). A **Details** section allows you to enter specific information concerning the time taken (example shown below).

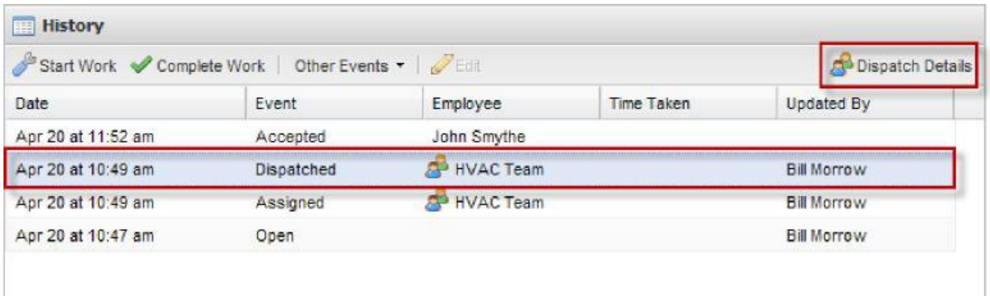


4. Some event types (Started, Delayed, Time Taken, Completed) have additional information attached to the event such as time taken or notes, and can be edited. Select the event type and click the **Edit** button. In the popup that opens, make whatever edits are required and click **Save**.
5. Pools are predefined groups of employees. After setting up one or more Pools, you will be able to assign work orders to Pools, either by using the routing table, or by manually assigning a specific work order to a pool. For more information on Pool configuration, see the Pools section under Work Order Routing. When a work order is dispatched to a Pool, the dispatch record is marked in the work order's history with a Pool icon ( ) beside the name, as shown below:



The work order history is updated as recipients within the pool respond with an ACCEPT or REJECT, as with any other work order. The first person to accept the work order is assigned to it, with the employee's name added to the history as an Accepted event, as shown above. A detailed log of each pool member's response to the work order is also recorded. You can view this additional log as follows:

- Click on the Dispatched even, then click **Distaptch Details**. The Details window will open.

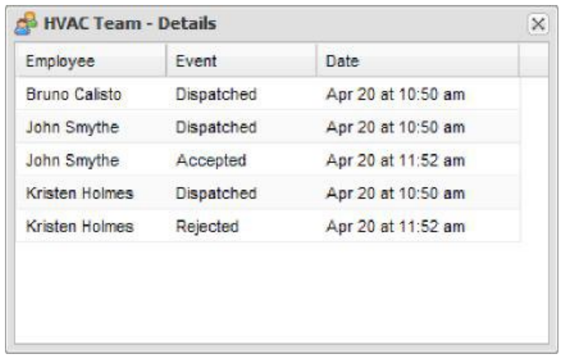


History

Start Work | Complete Work | Other Events | Edit | Dispatch Details

Date	Event	Employee	Time Taken	Updated By
Apr 20 at 11:52 am	Accepted	John Smythe		
Apr 20 at 10:49 am	Dispatched	HVAC Team		Bill Morrow
Apr 20 at 10:49 am	Assigned	HVAC Team		Bill Morrow
Apr 20 at 10:47 am	Open			Bill Morrow

- The Details window displays the responses logged from each employee in the Pool. When you are done reviewing the information, click in the top-right corner to close the window.



HVAC Team - Details

Employee	Event	Date
Bruno Calisto	Dispatched	Apr 20 at 10:50 am
John Smythe	Dispatched	Apr 20 at 10:50 am
John Smythe	Accepted	Apr 20 at 11:52 am
Kristen Holmes	Dispatched	Apr 20 at 10:50 am
Kristen Holmes	Rejected	Apr 20 at 11:52 am

Event Types

The table below displays a list of all events that can be added to a work order's history.

> Some events can be configured by default to trigger a tenant notification email, or can be set to do so on a case-by-case basis. For more information, see Tenant Notification Events below.

Event	Description
Open	The work order has been created, but not assigned or dispatched.
Assigned	Indicates the work order has been assigned but not dispatched.
Dispatched	The work order has been dispatched, but not yet accepted or rejected.
Dispatch Failed	The attempt to dispatch the work order could not be completed. This is often caused by a misconfiguration in the tradesperson's profile in Angus AnyWhere® (missing/incorrect device email address), or a problem with the Engineer's device (loss of signal or inactive device).
Accepted	The work order has been accepted by the tradesperson.
Rejected	Indicates the work order was not accepted by the tradesperson.
Travelling	The tradesperson is en route to the site.
Delayed	Indicates that work has been delayed. If **Work Started** has not previously been entered into the history, the **Delayed** event also counts as a **Work Started** event and is added to the history. This prevents level 1 and 2 escalations from occurring; see Escalations for more information.
Work Started	The tradesperson is on-site and has begun work.
Work Completed	Indicates work has been completed. See Closing a TR Work Order for additional details.

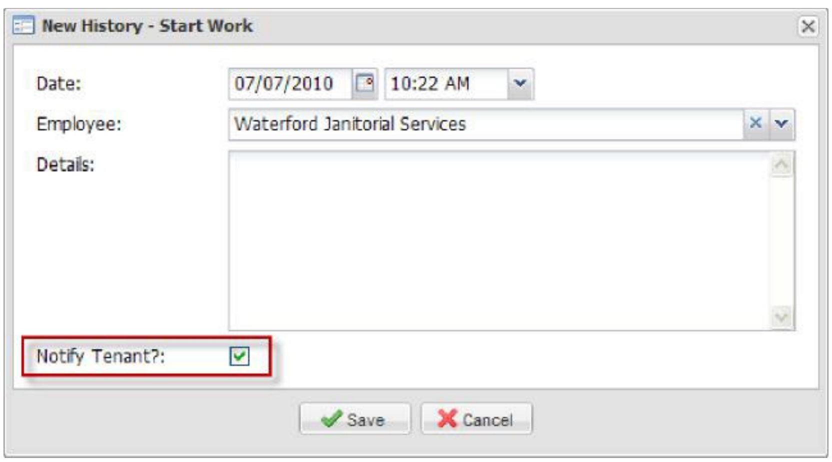
Event	Description
Time Taken	This is a generic entry that can be used to record anything that does not fit into any of the other event types. It can also be used to record time taken by a 3rd party (someone other than the person assigned to the work order).
Canceled	The work order was canceled.

Tenant Notification Events

Some events added to a work order's history can also trigger a tenant notification email. The default setting for whether these events will trigger a tenant notification are set in the tenant contact's settings. See Adding a Contact and The Contact Details Screen for more information.

Work orders associated with a resource reservation do not have the **Notify Tenant** option when updating work order status. No email is sent to tenants regarding work orders generated by resource reservations.

Whether or not these notification types are currently set by default to trigger a tenant notification email, the default setting can be overridden by checking or unchecking the **Notify Tenant** checkbox when adding the event (see example below).



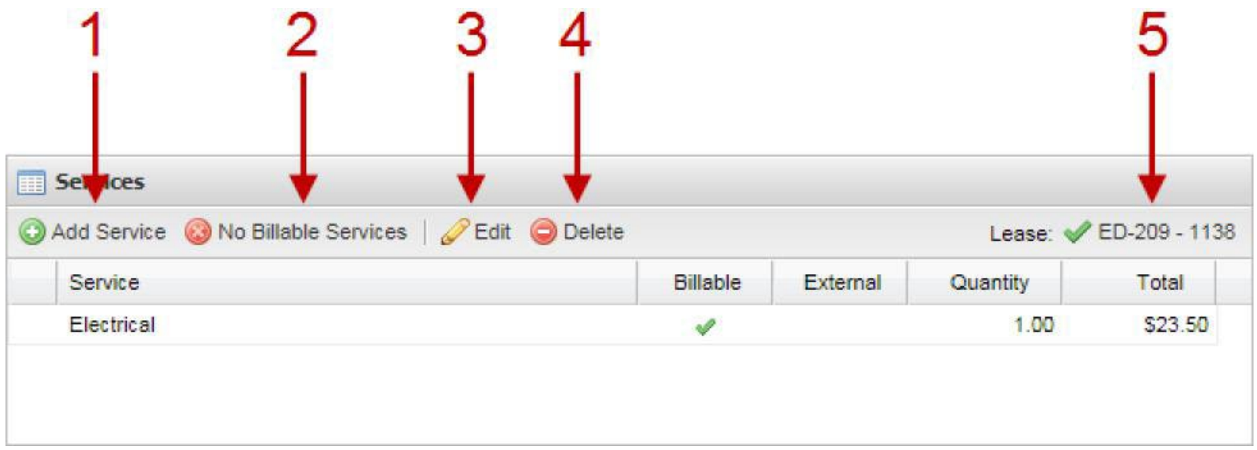
The event types that can be set to trigger a tenant notification email or modified using the **Notify Tenant** checkbox are as follows:

Event	Description
Travelling	The tradesperson is en route to the site.
Delayed	Indicates that work has been delayed.
Work Started	The tradesperson is on-site and has begun work.
Work Completed	Indicates work has been completed.
Canceled	The work order was canceled.

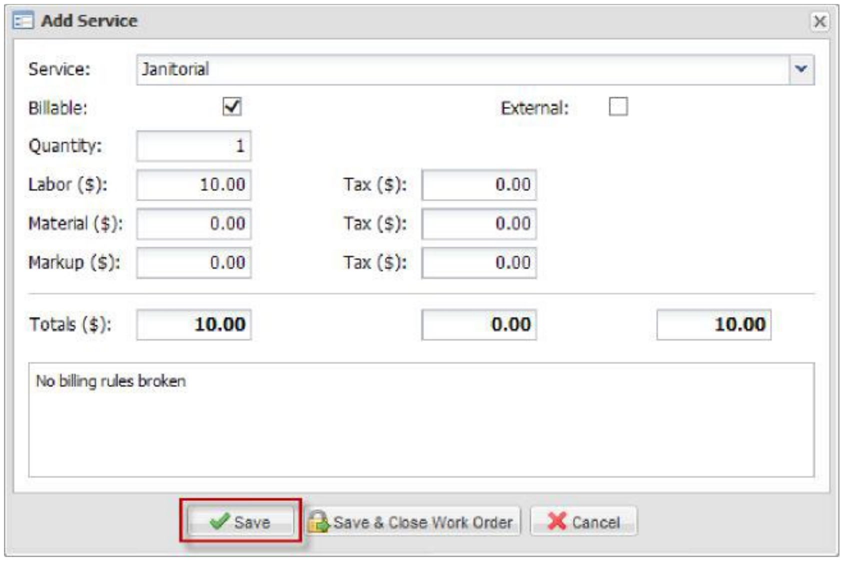
The Services Section

The Services section, located under the Workflow tab, displays a list of all services associated with a work order. Work orders cannot be closed until either at least one service is listed in this section, or it is flagged to indicate that there were no billable services.

- Depending on your access level, you may not be able to view (or modify) billable service costs. The ability to see and edit service costs is controlled through Role Security settings, under the Role Security Settings for Tenant Request/Angus AnyWhere Mobile subsection.
- If you are unable to see service costs, the process for adding, deleting and editing services is still essentially the same as outlined in the subtopics below, except that you will not see any fields associated with service costs (for example, editing a service will only allow you to change the service type).

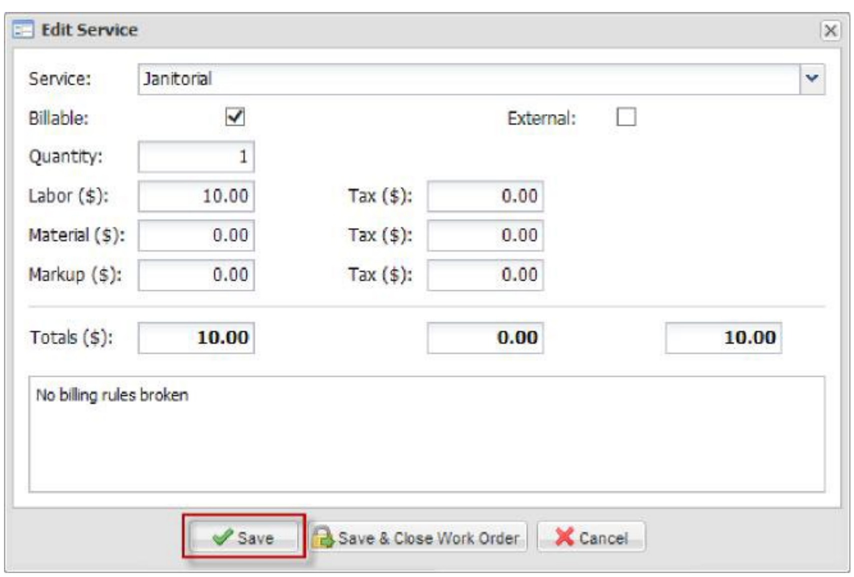


1. To add a service to a work order, click **Add Service**. In the window that opens, select a service using the dropdown list provided. Please note that the service amounts are predetermined based on your service configuration. See About Service Schedules and related topics for more information.
    - If the service is billable, place a checkmark beside **Billable**. If the billing is external, select the **External** checkbox.
    - Enter the Quantity in the field provided.
    - You may also optionally modify the labor, material, markup and tax amounts for each if custom billing is required; if you have billing rules enabled, a section at the bottom of the screen will inform you if any billing rules have been broken.
    - When you are finished, click **Save** to add the service; or, if all other necessary tasks to close the work order have been completed, a **Save & Close Work Order** button is available, allowing you to save the service and close the work order in a single step.

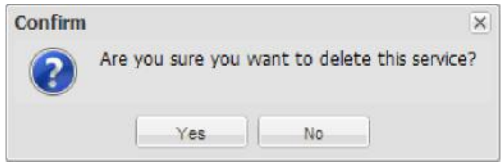


2. To modify a service that has been added, select the service from the list and click **Edit**. A popup window will appear.

- In the window that opens, a dropdown list provided to change the service if required.
- Add or remove a checkmark beside **Billable** to indicate whether the service can be billed.
  - o Similarly, add or remove a checkmark beside **External** to indicate whether the service is externally billed.
- If the service was performed multiple times, enter the Quantity in the field provided.
- You may also optionally modify the labor, material, markup and tax amounts for each if custom billing is required; if you have billing rules enabled, a section at the bottom of the screen will inform you if any billing rules have been broken.
- When you are finished, click **Save** to update the service; or, if all other necessary tasks to close the work order have been completed, a **Save & Close Work Order** button is available, allowing you to save the service and close the work order in a single step.



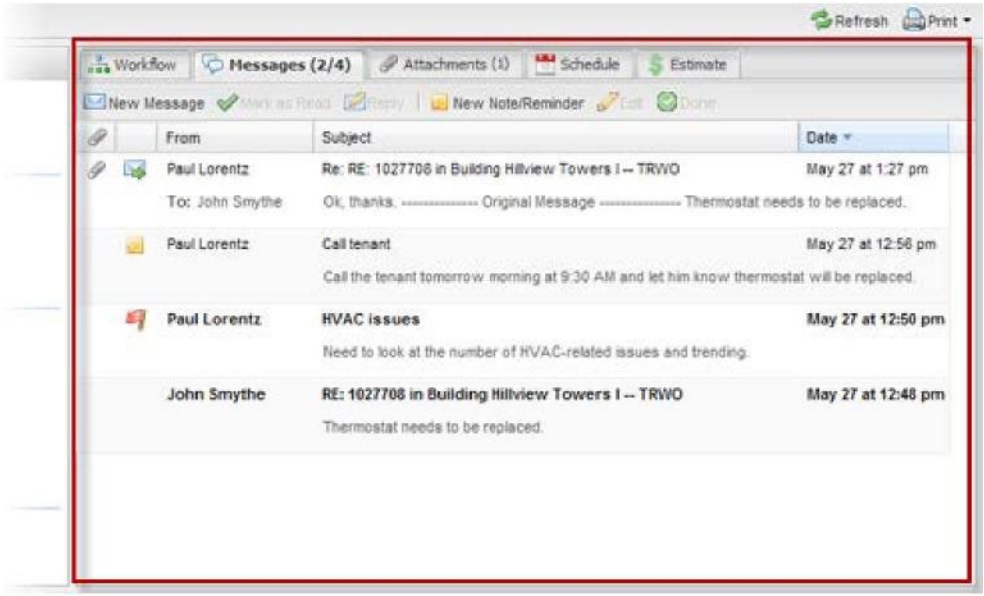
3. To modify a service that has been added, select the service from the list and click **Delete**. A confirmation dialogue will appear. Click **Yes** to confirm the deletion.



4. If no services need to be recorded, click **No Billable Services**. If there are currently services listed, these services must be deleted before this option can be selected.
5. If the displayed lease code is incorrect, you can click on the displayed lease code to change it, or if no lease code is displayed, you can click here to select an applicable lease code.

The Messages Tab

The Messages tab, located towards the right of the work order, displays messages related to the work order.



There are four different types of messages that can appear under this tab:

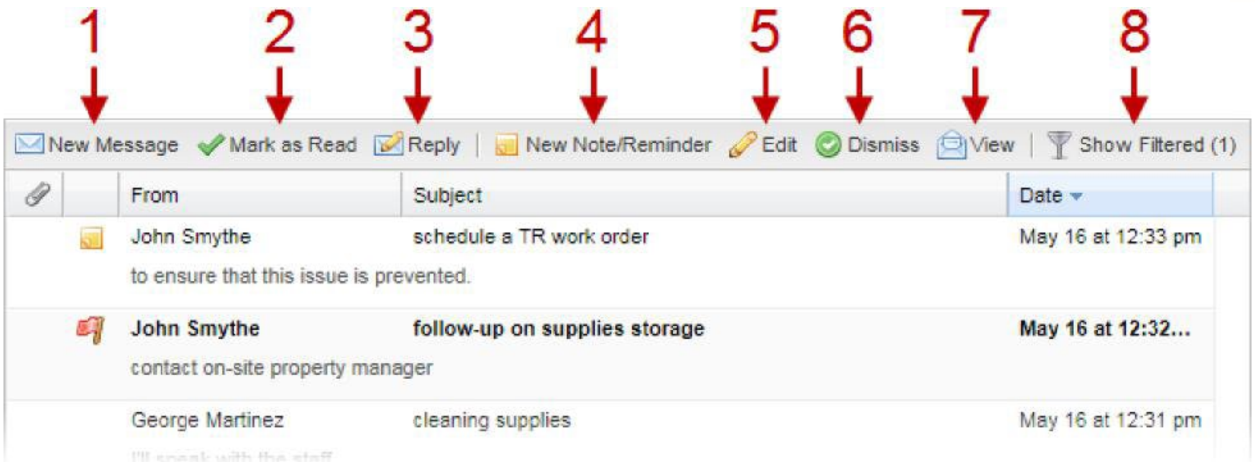
- **Incoming Messages**
  Messages that are received by email are displayed in this interface. Messages marked in bold are unread. Unread messages also appear in the Messages list. Messages received an attachment are additionally marked in the attachment column with a paperclip icon ( ).

- **Outgoing Messages**
  Outgoing messages that are sent by email to one or more recipients and are tagged with this icon. Messages sent with an attachment are additionally marked in the attachment column with a paperclip icon ( ).

- **Reminders**
  Reminders are created by Angus AnyWhere® administrators, are always displayed in bold and are not sent to an email recipient. Reminders can be used as a high-priority "to-do" note, which will also appear on the Messages list.

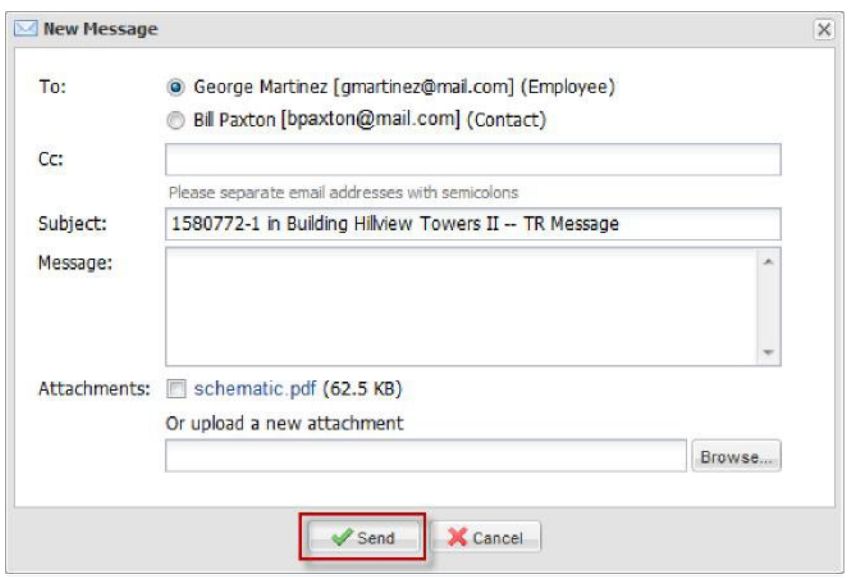
- **Notes**
  Notes are lower-priority reminders that are only displayed within the Messages tab of the work order they are associated with.

For additional information on the various features and functions in this tab, refer to the diagrammed image and explanations provided below.



1. To send a new message, click **New Message**.

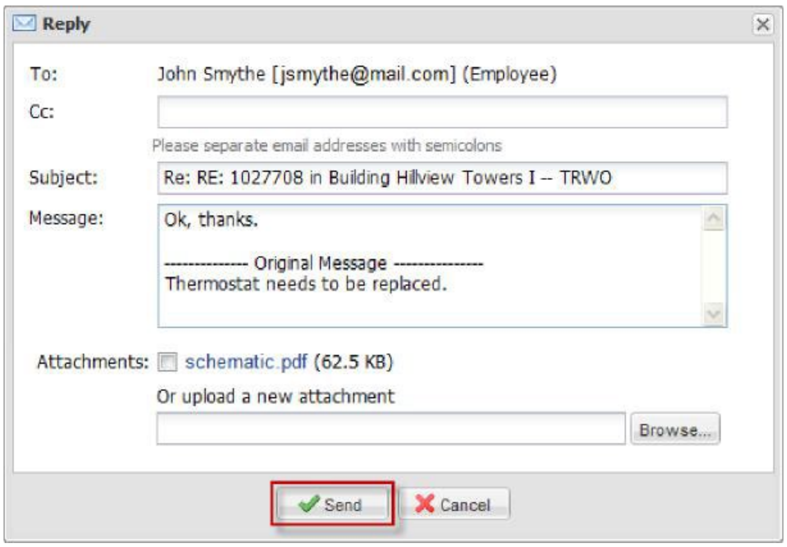
- In the New Message popup, indicate whether you would like to send the message to the employee (or vendor) assigned to the work order, or to the tenant contact that sent the Tenant Request. You can fill in additional email addresses in the **Cc** field (separate multiple addresses with semicolons.)
- If needed, you can also edit the **Subject**.
- Type your message into tthe **Message** field.
- You can add any attachments associated with your work order to the message by placing a checkmark beside them in the **Attachments** section. Alternatively, you can upload a new attachment using the **Browse** button.
- Click **Send**. Your message has been sent.



2. To mark a message as read, select the message and then click **Mark as Read**. Messages that are marked as read will no longer appear in the Messages list. If the message you select is unread, the button will instead read **Mark as Unread**. Messages that are marked as unread will appear in the Messages list.

3. To reply to a message, select the message you want to respond to, then click Reply. The Reply popup window will open.

- In the reply popup, the **To** field is autofilled. If you would like to send the message to additional recipients, you can fill in additional email addresses in the **Cc** field (separate multiple addresses with semicolons).
- If required, you can also edit the **Subject**.
- The original message text is included in the **Message** field. You can type in your response above the original message text or delete the original text before entering your message.
- You can add any attachments associated with your work order to the message by placing a checkmark beside them in the **Attachments** section. Alternatively, you can upload a new attachment using the **Browse** button.
- Click **Send**. Your message has been sent.



- Sent messages will appear under the Messages tab. All outgoing messages are marked with  a icon.

4. Reminders and notes are created by Angus AnyWhere® administrators, and are not mailed or sent to anyone. Notes reside solely on the work order's messages tab, while reminders are additionally displayed in the Messages list. To create a new note or reminder:
   - In the Edit Note/Reminder window, modify the **Subject** and **Message** field as needed.
   - By default, the message will be a note. To convert this note into a reminder, place a checkmark beside **Make a Reminder**.
   - Click **Save** to create the note or reminder.
5. To edit a note or reminder, select one from the list and click **Edit**.
   - Edit any of the fields as necessary.
   - You can convert the message between a reminder or a note by checking or unchecking **Make a Reminder**.
   - Click **Save** to save your changes.

6. If the reminder is no longer needed, you can dismiss the reminder. Dismissing a reminder converts it into a note, that is no longer displayed in bold text and will only be displayed within the Messages tab of the work order it is associated with (i.e. it will no longer be displayed in the Messages list).

Notes that were appended to a work order using the Service Portal cannot be **dismissed** or **marked as read**.

- To dismiss a reminder, select the reminder from the list and click **Done**. Your reminder has now been converted into a note.

7. Select a message click **View** to see its contents. Alternatively, you can double-click on a message (either inbound or outbound) to see its contents.
8. By default, messages that have been flagged as spam or autoreplies are not displayed. Clicking **Show Filtered** will display these messages.

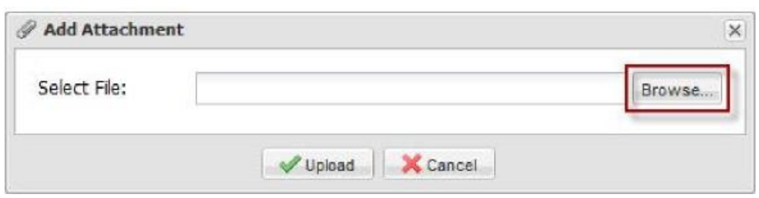
The Attachments Tab

The attachments tab allows you add files such as pictures, text documents and Adobe PDF files to work orders. These attachments can also be selectively included in communications sent via the Messages tab. You can also remove attachments associated with the work order using this interface. Each attachment can be a maximum of 10 MB in size.

Angus AnyWhere® Mobile for iOS and AndroidTM users are able to view attachments on work orders that have been dispatched to them. See below for additional details.

1. To add an attachment to a work order, click **Add Attachment**.
    - In the window that opens, click **Browse** to locate the file that you would like to upload; this opens a new window that allows you to locate and select the file.

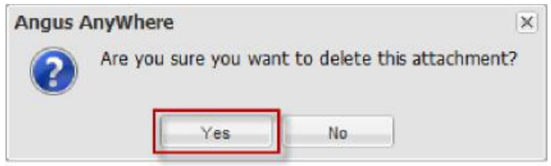
Each file you upload can be a maximum of 10MB in size. Depending on the size of the attachment and the amount of bandwidth you have, the time required to upload attachments can vary.



    - After selecting the file, click **Open**.
    - In the Add Attachment window, click **Upload**. The file will now be uploaded.
2. To delete an attachment, select the file you want to remove and click **Delete.**

In order to ensure an accurate work order history, attachments included by the Tenant while submitting their request cannot be deleted.

    - In the confirmation window that opens, click **Yes**. The attachment is now deleted.



3. To view an attachment, click on its name. Depending on the file type, the file will either be opened under a new browser tab, or you will be presented with a dialogue box giving you the option to download and/or open the file with an appropriate application. For example, image files and PDFs are typically displayed in a new browser window, while Microsoft Word attachments will be downloadable and viewed using Microsoft Word.

The Schedule Tab

The Schedule tab allows users to quickly create a recurring schedule based on the current work order, or to access an existing schedule responsible for creating the current work order.

Recurring Schedules are useful when Tenants require recurring work on set days and times. Recurring Schedules can be set up to automatically generate Work Orders on pre-configured days and times. Any settings made for Work Order Routing, Escalation or Auto-Dispatch will be processed.

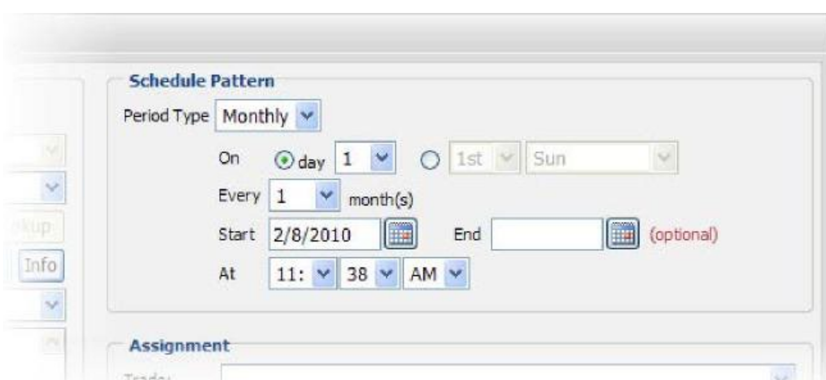
Under the Schedule tab, if there is not schedule associated with the work order, use the **Click here to create Schedule** link to view the scheduling screen. If there is already a schedule, this link will instead read **Click here to view the Schedule**.

Recurring Schedules can be set up from specific Tenant Request Work Orders. For more information, please refer to the additional subsections below.

Creating a Recurring Schedule

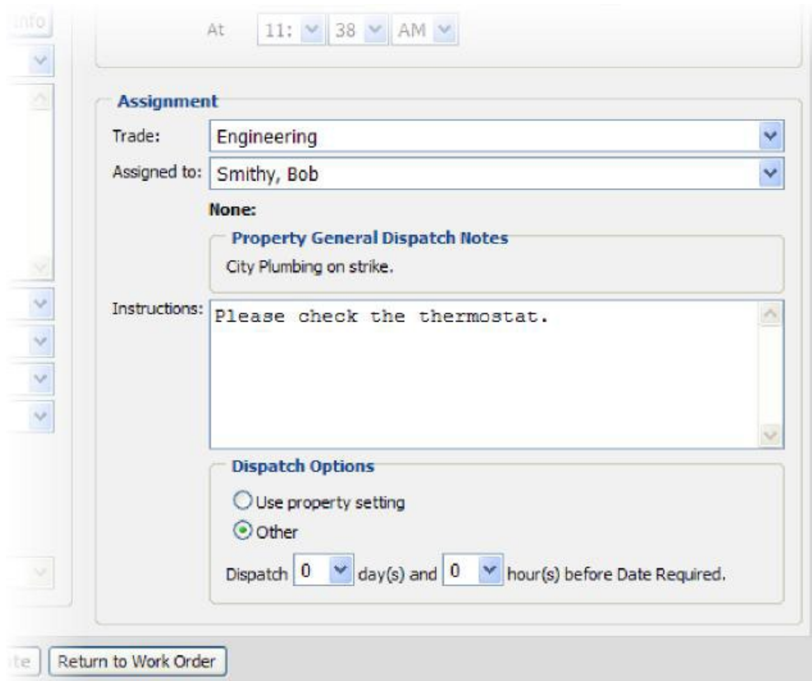
To create a Recurring Schedule, open the Tenant Request or Work Order. See Finding Tenant Requests or Finding Work Orders for more information.

1. Use the **Click here to create Schedule** link to display the schedule editor.
2. By default, the system enters the Request Details from the work order. Changes can be made to this section as needed.
3. In the Schedule Pattern section, click the **Period Type** field and select the period.
4. Using the date/time fields provided, select the times for the schedule to be generated.



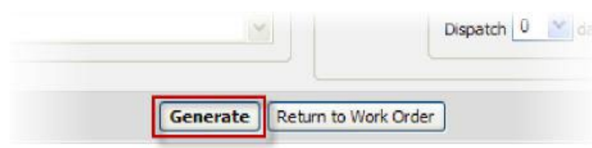
5. In the Assignment section, click the **Trade** field and select the trade from the drop-down list.

6. If necessary, click the **Assigned To** field and select the Employee from the drop-down list. Otherwise, the system will assign and dispatch the Work Orders according to the rules for the Request Type in Work Order Routing.



7. Click the Instructions field and enter any instructions.

8. Click **Generate**. The Work Order is generated and appears on the To-Do Work Orders list.



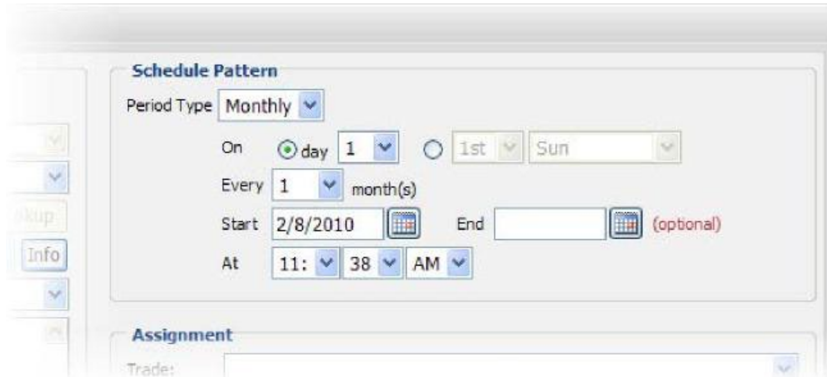
Editing a Recurring Schedule

1. Use the **Click here to view the Schedule** link to display the schedule.

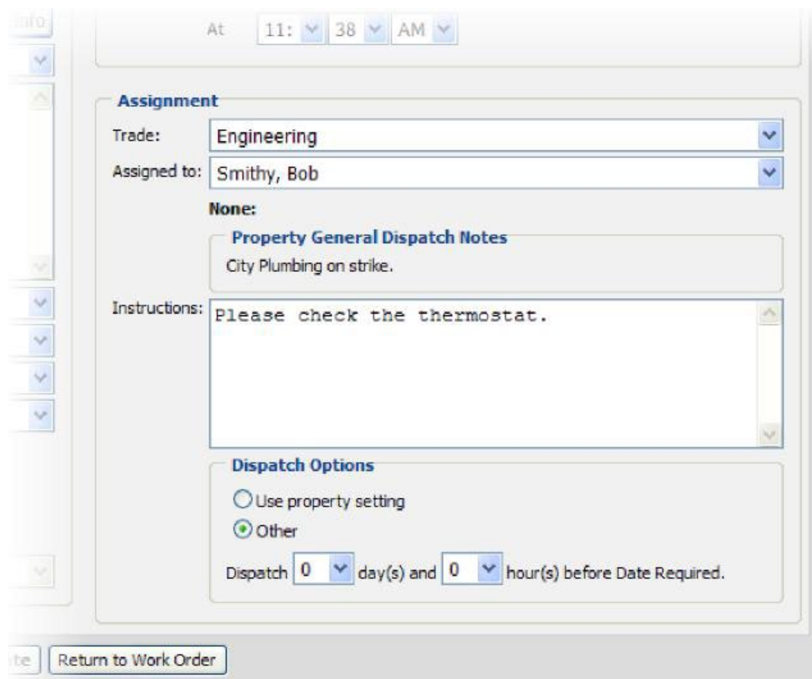
2. By default, the system use the Request Details from the work order. Changes can be made to this section as needed.

3. In the Schedule Pattern section, click the **Period Type** field and select the period.

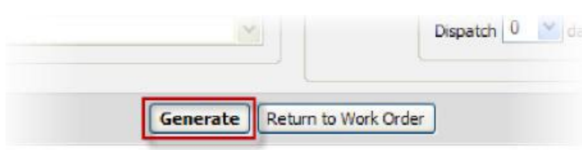
4. Using the date/time fields provided, select the times for the schedule to be generated.



5. In the Assignment section, click the **Trade** field and select the trade from the drop-down list.
6. If necessary, click the **Assigned To** field and select the Employee from the drop-down list. Otherwise, the system will assign and dispatch the Work Orders according to the rules for the Request Type in Work Order Routing.



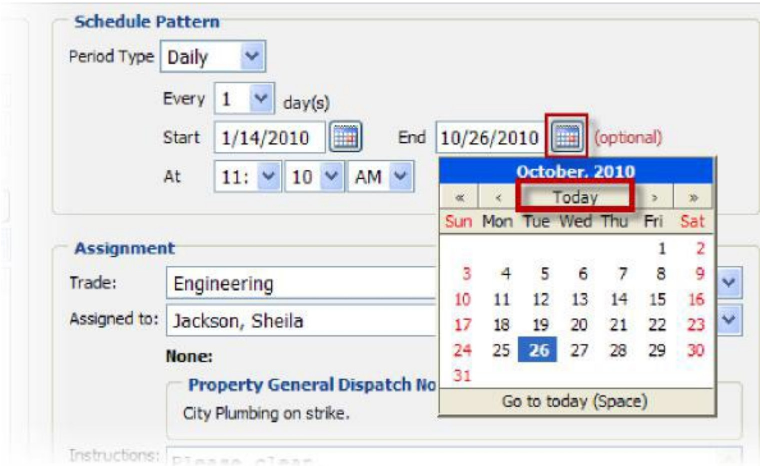
7. Click the Instructions field and enter any instructions.
8. Click **Generate**. The Work Order is generated and appears on the To-Do Work Orders list.



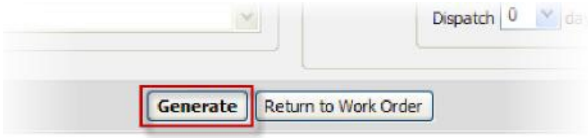
Stopping/Canceling a Recurring Schedule

To cancel a recurring schedule, follow the steps below:

1. Use the **Click here to view the Schedule** link to display the schedule.
2. In the **Schedule Pattern** section, click the calendar button ( ) beside the **End** field. In the calendar interface that pops up, click **Today**.



3. Click **Generate**. The Schedule is updated and no new work orders will be generated from this schedule.



The Estimate Tab

Tenants can request Estimates when submitting a service request via the Service Portal. Administrators can create Estimates in Angus AnyWhere® in response to requests made using the Service Portal, telephone or e-mail. The Property Management Office may also choose to create Estimates proactively in order to inform Tenants of unusual charges associated with their requests. Estimates can be formulated by means of pre-configured services if the work to be done corresponds to existing services that are provided for the property.

The main home page displays both created and approved estimates for Work Orders. Work Orders for which an estimate has been requested are displayed on the Estimates list under Tenant Request.

The history of Estimates is tracked and once approved, Estimate line items are automatically copied into the Work Order in the Services section. Estimates can also be printed when a Tenant wishes to provide a signature of approval on a hard-copy.

The Estimates feature is activated by Angus Systems at the request of your Company.

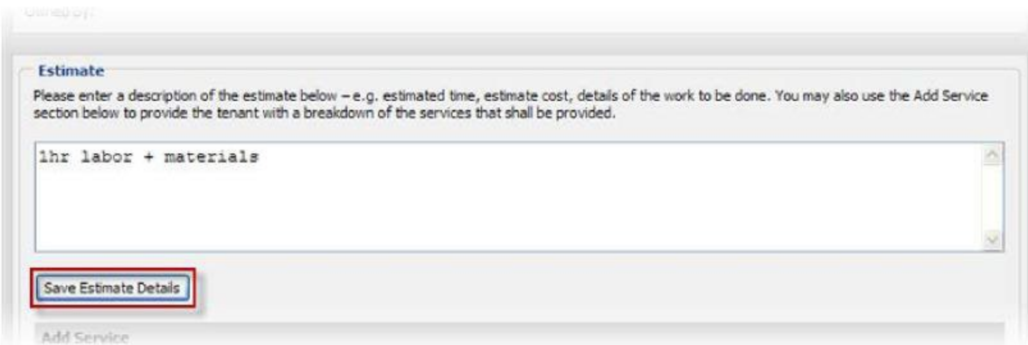
For more information on working with the estimates tab, refer to the additional subtopics in this section.

Creating Estimates

If your company provides a Service Portal tenants may request Estimates using this interface. These requests for Estimates are displayed on the Home Page with a red E icon, indicating that an Estimate is required.

- When attempting to create an estimate from a work order created within Angus AnyWhere, the Work Order must have the Tenant Contact assigned prior to the creation of the work order; otherwise, the Estimate tab will not be displayed.
- Estimates should not be created for proactive work orders (work orders with **requested by employee** checked) as estimates only apply to tenant-initiated requests that may (or may not) become billable. An estimate that is requested on a work order can be found in the TR work order Estimates list.
- To ensure that a service is included in estimates sent to tenants, when adding services you must ensure that the **Billable** checkbox is selected before saving the service.

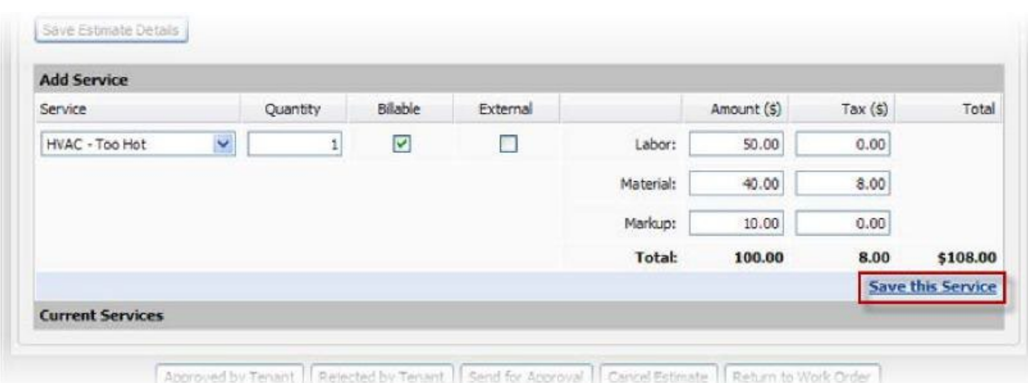
1. Under the Estimate tab, use the **Click here to create Estimate** link.
2. Enter the description of the estimate in the text window (cost, time, details, etc.)
3. Click **Save Estimate Details**.



4. You can also describe the estimate by adding existing Services in the Add Service section. Services are pre-configured work line items that can be added to the Estimate, to reflect the work that will be done along with the associated cost.

Services must have the **Billable** flag (as shown below) enabled, otherwise the Work Order will not be billable and the user will have to recreate the work order.

5. When you are done adding a service, Click **Save this Service**.



6. If you want to delete any added services, click **Delete** next to the service in the list.

7. After you complete the Estimate information, click **Send for Approval**.

8. The new request is displayed in the Estimates list.

   - The Estimate is then sent to the Tenant, or communicated by telephone, by e-mail, or printed for the Tenant's approval.
   - The Tenant can approve the Estimate via TSI or inform the Administrator verbally, by e-mail, or relay the printed approval back.

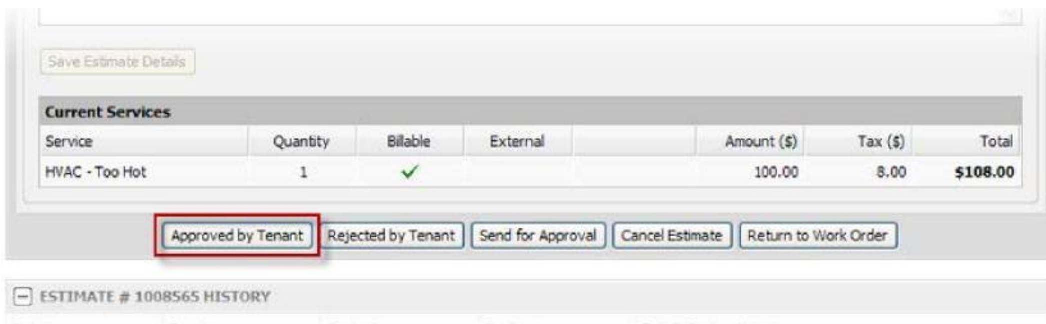
Approving Estimates

When estimates are submitted using the Service Portal, the tenant is notified by e-mail with the estimate information. The tenant can choose to either approve or reject the estimate at this point.

If the tenant has expressed approval of the estimate by other means, you can approve the estimate from within Angus AnyWhere as follows:

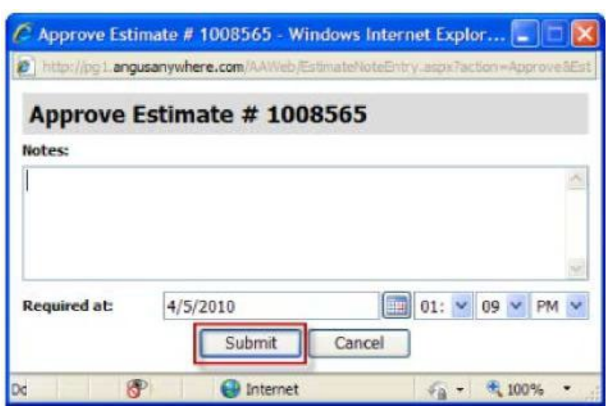
1. Use the **Click here to view the Estimate** link to start the approval process.

2. At the Estimate screen, click **Approved by Tenant**. A window will popup where you can enter any approval notes communicated by the Tenant.



3. You may want to enter information such as who approved the estimate, whether it was approved by phone, e-mail or in-person, or if the Estimate was printed and approved with a signature.

4. Click **Submit**.



5. Now that the estimate is approved, its status in the Estimates list will be marked as approved. all estimate line items are automatically copied into the work order in the Services section under the Workflow tab.

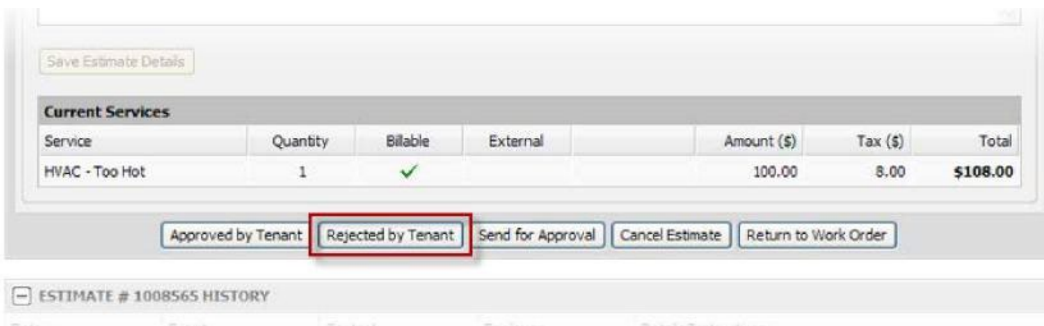
Rejecting Estimates

When estimates are submitted through the Service Portal, the tenant is notified via e-mail with the estimate information. The tenant can choose to reject the estimate at this point.

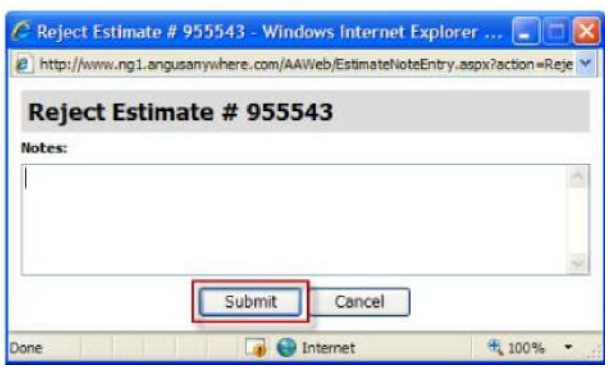
If the tenant has rejected the estimate by other means, you can reject the estimate from within Angus AnyWhere as follows:

1. Use the **Click here to view the Estimate** link to display the estimate's details.

2. At the Estimate screen, click **Rejected by Tenant**. A window will popup where you can enter any rejection notes communicated by the tenant.



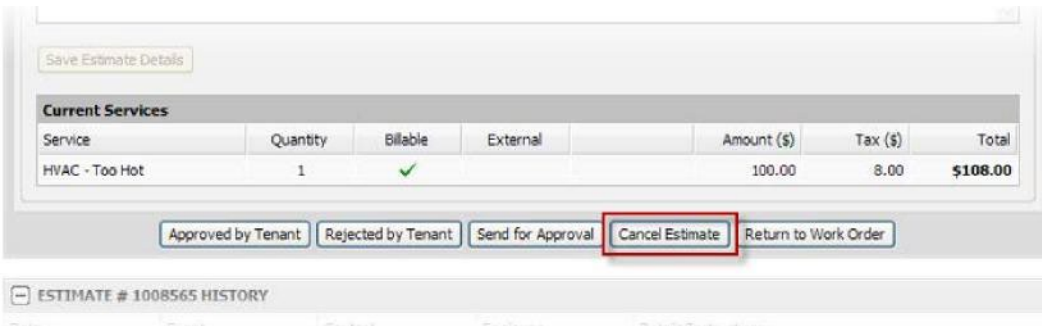
3. Click **Submit**. The estimate has now been rejected.



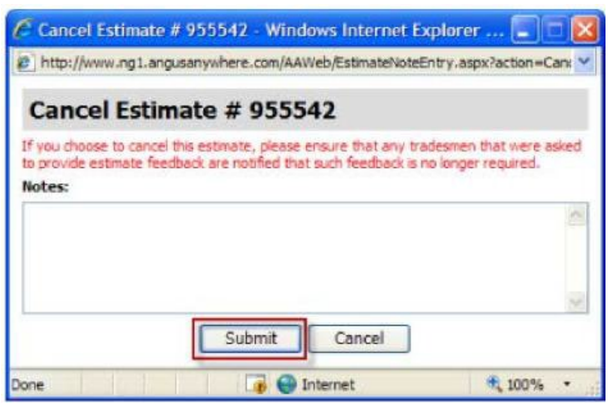
Cancelling Estimates

1. Use the **Click here to view the Estimate** link to display the estimate.

2. At the Estimate screen, click **Cancel Estimate**. A window will popup where you can enter any cancelation notes.



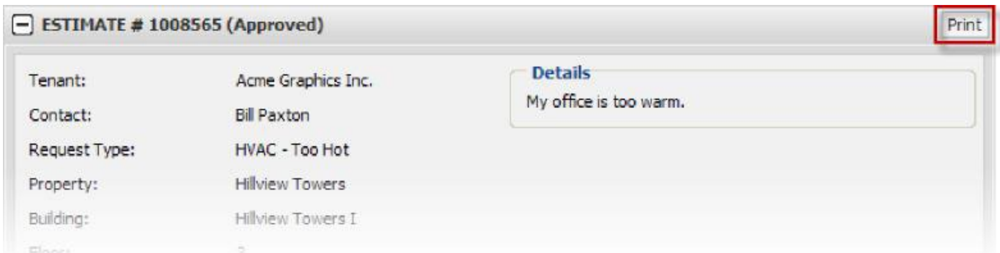
3. Click **Submit**. The estimate has now been rejected. This does not affect the Work Order creation process in any way. A link to the canceled estimate will be displayed under the **View Estimate** tab.



Printing Estimates

1. Use the **Click here to view the Estimate** link to display the estimate.

2. Click **Print** in the Estimate heading. The Estimate is displayed and the Print dialogue window is displayed by your computer.



3. Click **Print**. The estimate will now be printed.

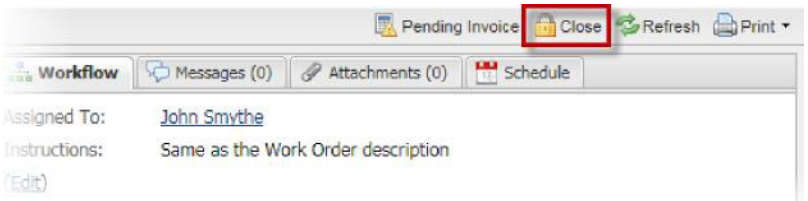
Closing a TR Work Order

Work orders are ready to be closed when:

- All work has been completed for the work order.
- Billable services have been added (or **No Billable Services** has been selected), and
- Any pending invoices have been received.

To close a work order, follow the steps below:

1. Locate the work order you would like to update. See Finding TR Work Orders for additional details.
2. In the work order details, click the **Close** button near the top-right corner of the screen.



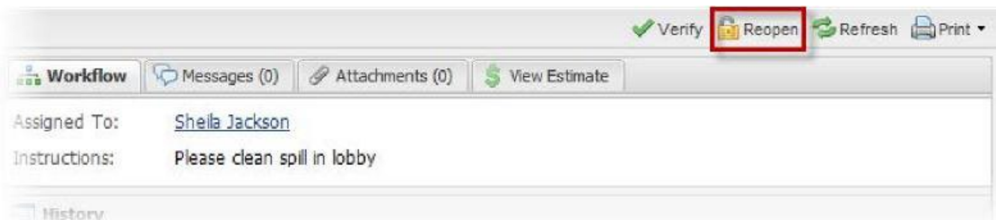
3. The work order is now closed. If billable services were applied to the work order, it will now be listed under Billing Verification.

Reopening a Work Order

It is sometimes necessary to reopen a work order, either because the work order was accidentally closed prematurely, or (for the sake of continuity of record keeping) if the work was not completed satisfactorily.

To reopen a work order:

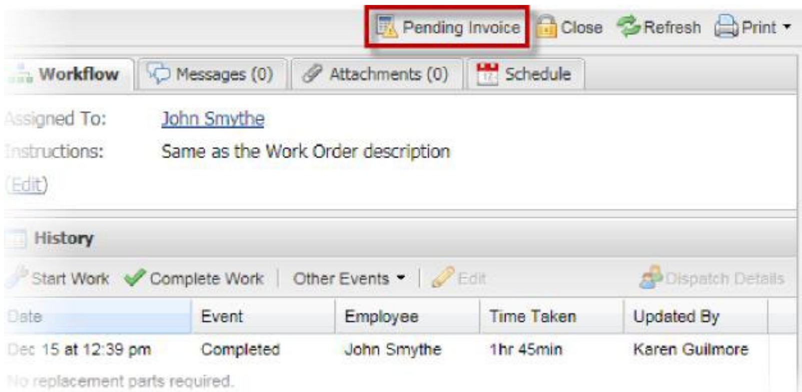
1. Enter the work order number in the search box. Or, if you do not know the work order, use the advanced search function. For more information, see Finding TR Work Orders.
2. Click **Reopen**. The work order is now open again.



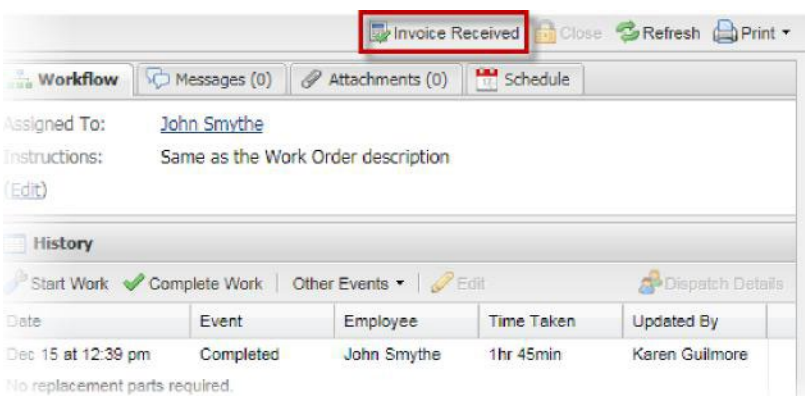
Work Orders with Pending Invoices

The **Pending Invoice** button is only visible after a Work Completed event has been added in the History section.

Typically when work is completed by a Vendor, your company will be invoiced for the work. If the invoice has not been received by the time that the work was completed, you can indicate this by clicking the **Pending Invoice** button near the top-right corner of the work order.



- After clicking **Pending Invoice**, the button name will change to **Invoice Received**, which should not be clicked until the invoice has been received.
- Flagged work orders show the Pending Invoice icon ( ) in the To Close list.
- Work orders with a Pending Invoice cannot be closed until **Invoice Received** has been clicked, as shown below.



Once the invoice has been received, you can then close the work order.

Bulletins

About Bulletins

- Bulletins is an optional feature within the Tenant Service Request module. Contact Angus Systems Support if you are interested in enabling this feature.
- Corporate Administrators can manage access to view and edit bulletins in Angus AnyWhere by employee role, via role security.

Bulletins keep call center employees better informed about issues at properties when taking calls from tenants. Bulletins are also displayed on Service Portals, keeping tenants better informed on upcoming and existing issues.

Enabling this feature allows you to do the following:

- Manage a list of bulletins concerning planned and unplanned service disruptions, such as power or water outages, or building systems that are temporarily out of service (e.g. elevators).
    - New Bulletins that have not yet been read by a user are noted on the Bulletins menu option, and displayed in bold on the Bulletins list.
- View a list of relevant bulletins when creating a new Tenant Service Request, and optionally link tenant requests to a related bulletin instead of generating a new work order.
    - Requests are logged as part of the related bulletin's details, and used to notify tenants when the issue has been resolved. Requests to not require assignment, routing, or billable services, and are not escalated. This eliminates the generation of redundant work orders and escalation notices.
- When a bulletin is closed, automatically notify all tenant requests linked to that bulletin that the situation has been resolved (requires tenant contacts to be subscribed to **Request Completed** events).
    - Tenant contact information is also available via the bulletin details screen, allowing call center employees to manually contact tenants on an as-needed basis.
- Convert pre-existing duplicate work orders to requests that are appended to the bulletin.
    - Converted work orders that had been assigned and dispatched are removed from the employee's work order list.

Refer to the additional topics in this section for details on using Bulletins.

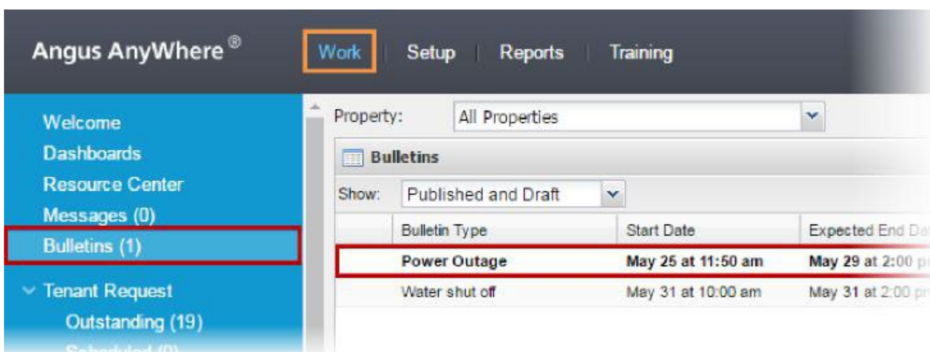
The Bulletins List

For an overview of the general purpose of Bulletins, see About Bulletins.

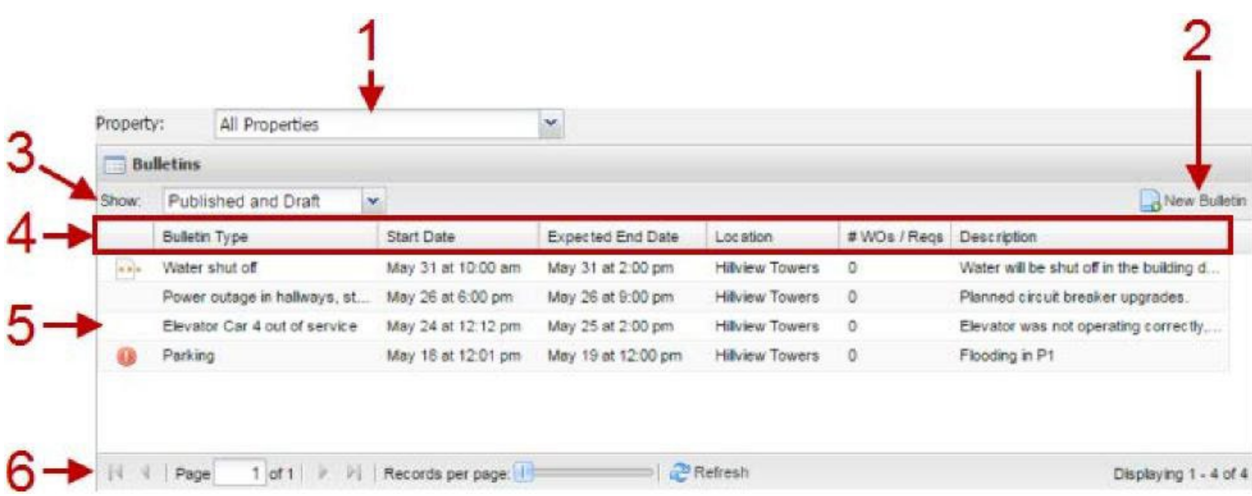
The Bulletins list displays all notices related to planned and unplanned outages, or other disruptions to normal building operations that may be noticed and reported by multiple tenants. Applicable bulletins will be displayed when creating Tenant Request (TR) Work Order on behalf of a tenant, and append the request to a related bulletin, preventing duplicate work orders from being entered into the system and appearing on tradespeople's assigned work order lists.

To access the Bulletins list, click **Work** from the main menu, then **Bulletins**.

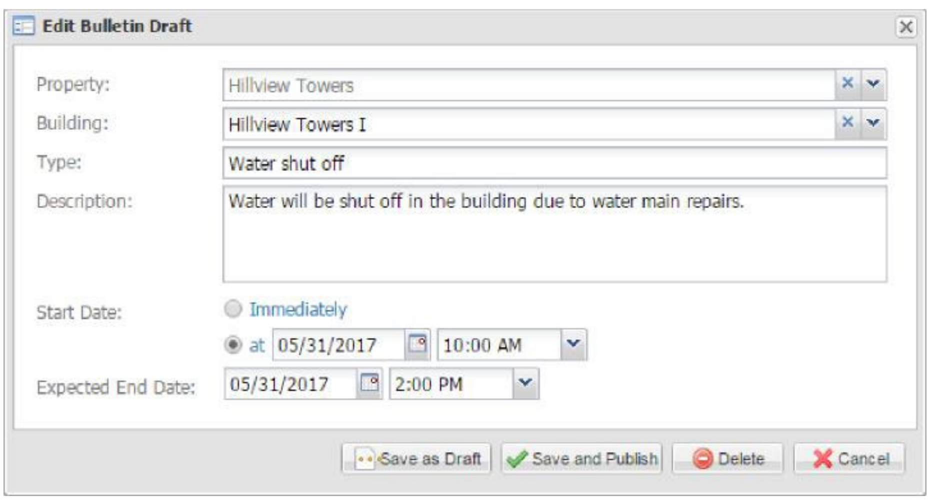
- New bulletins are marked as unread. The number of unread bulletins are displayed beside the **Bulletins** menu item and are displayed in bold within the list (as shown below).
- Previously read Bulletins that are updated are re-listed as unread.
- If you are the author of a bulletin, or personally made updates to a bulletin, it is automatically marked as read for you.
- Closed bulletins are not counted as unread. For example: an employee is on vacation and misses several bulletins that are now closed. Upon returning to work, these bulletins will not be listed as unread.



From the bulletins list, users can view, create, edit and close bulletins. The following features and functions are available on this list:

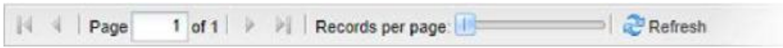


1. You can use the **Property** dropdown to filter the list by property.
2. Click **New Bulletin** to create a bulletin. For additional details see, Creating a Bulletin.
3. The **Show** dropdown allows you to filter the list status: Published and Draft (default), Published, Draft, or Closed.
    - **Published** bulletins are currently in use.
    - **Draft** bulletins are not active and may require additional revisions before publishing.
    - **Closed** bulletins are no longer in use (the issue they are associated with has been corrected).
4. The Bulletin Type, Start Date, Expected End Date, Location, Number of associated work orders and requests, and Description is displayed for each bulletin in the list. An additional column on the left is used to display the following status icons:
    - **Draft:** indicates that the bulletin has been created but was not yet published. Draft bulletins may require additional revisions before they are ready to be published.
    - **Past Expected End Date:** indicates that this bulletin is still in an active (published) state but has past its estimated resolution date and time.
    - **Closed** bulletins (only displayed if the **Show** dropdown is set to All or Closed) are no longer active.
    - **Published** bulletins do not display a status icon.
5. Double-click on a bulletin to view its details.
    - Bulletins with a status of Draft will open an Edit Bulletin Draft widow, allowing you to update, publish, or delete the bulletin.

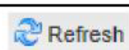


    - Bulletins with any other status will take you to their details screen. See The Bulletin Details Screen for additional information.

6. At the bottom of the list is a control toolbar that allows you to access several commonly-used display features.



The following list controls are available:

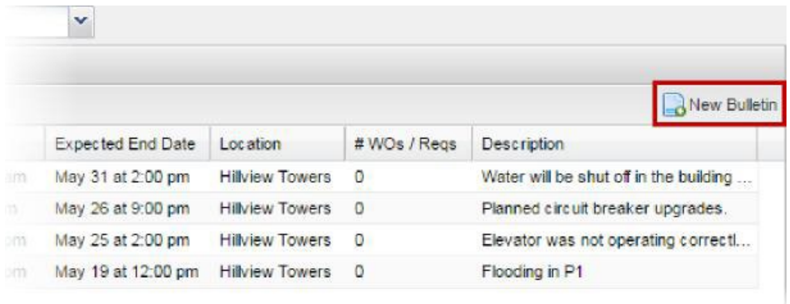
	Return to the first page of the list.
	Go to the previous page.
	Manually enter a specific page to go to.
	Go to the next page.
	Go to the last page.
	Use the slider to adjust the number of records displayed per page.
	Reload the list (checks for updates to the list since it was last loaded).

Creating a Bulletin

For an overview of the general purpose of Bulletins, see About Bulletins.

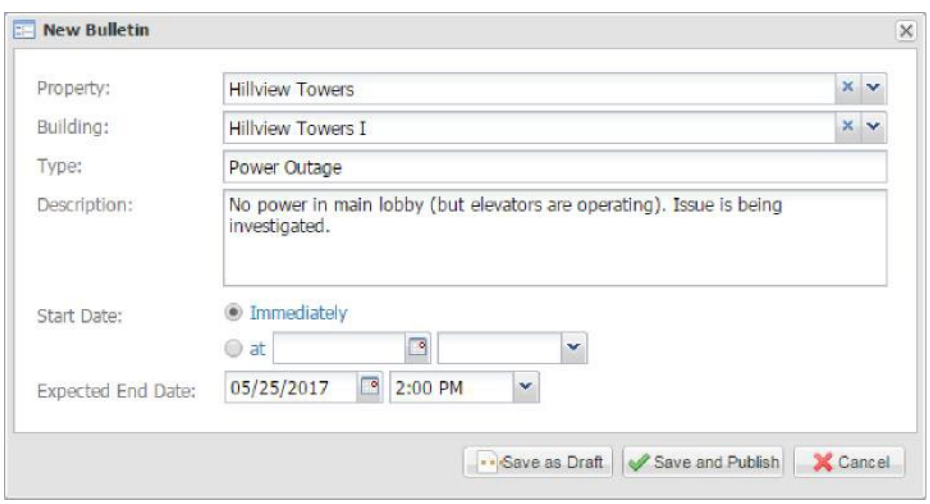
To create a new Bulletin, follow the steps below:

1. From the Bulletins list, click **New Bulletin**.



2. In the New Bulletin popup, enter the following information using the dropdown menus and text boxes provided:

    - The affected **Property**.
    - The **Building** (if applicable).
    - Enter the **Type** (general category) that the bulletin is for, e.g. "power outage", "water leak", etc.
    - A more detailed **Description** of the issue.
    - The **Start Date**. If this is a planned outage, you can select **At** and specify the start date and time using the fields provided. Otherwise, leave the selection at **Immediately**.
    - Enter an **Expected End Date** using the fields provided. Note that this is simply an estimate for when the situation is expected to be resolved by, and will not cause the bulletin to be automatically closed.



3. If you are ready to make the Bulletin immediately active, click **Save and Publish;** otherwise, click **Save as Draft**.

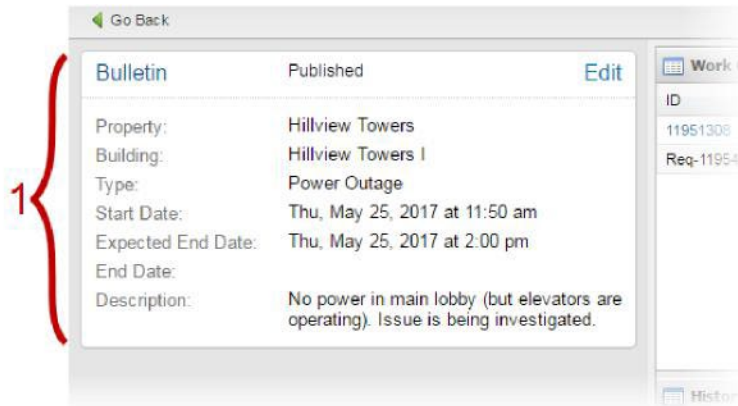
If you **save and publish** a Bulletin that has a start date set for a future date and time, it will still be displayed when creating new Tenant Request work orders and on applicable tenant Service Portals, allowing both employees and tenants to be kept informed of upcoming maintenance. To prevent a bulletin from being immediately visible, select **Save as Draft**.

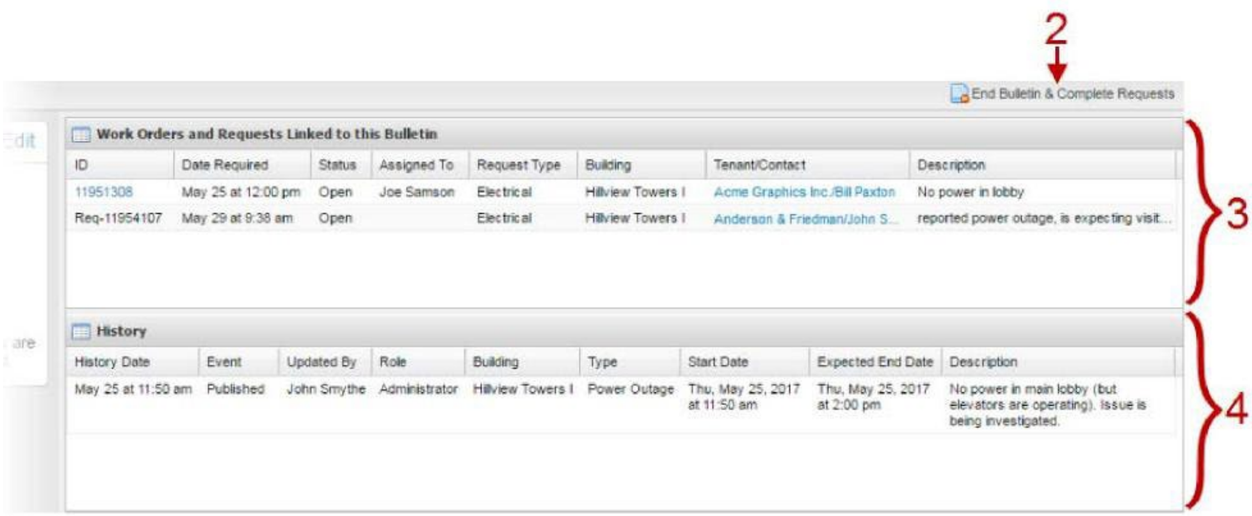
The Bulletin Details Screen

From the Bulletins list, you can double-click on a bulletin to view its details. The Bulletin Details screen is divided into three sections:

- Work orders and Requests linked to this bulletin are displayed at the top-right.
- The bulletin's history (opened, saved as draft, published, updated) is displayed to the bottom-

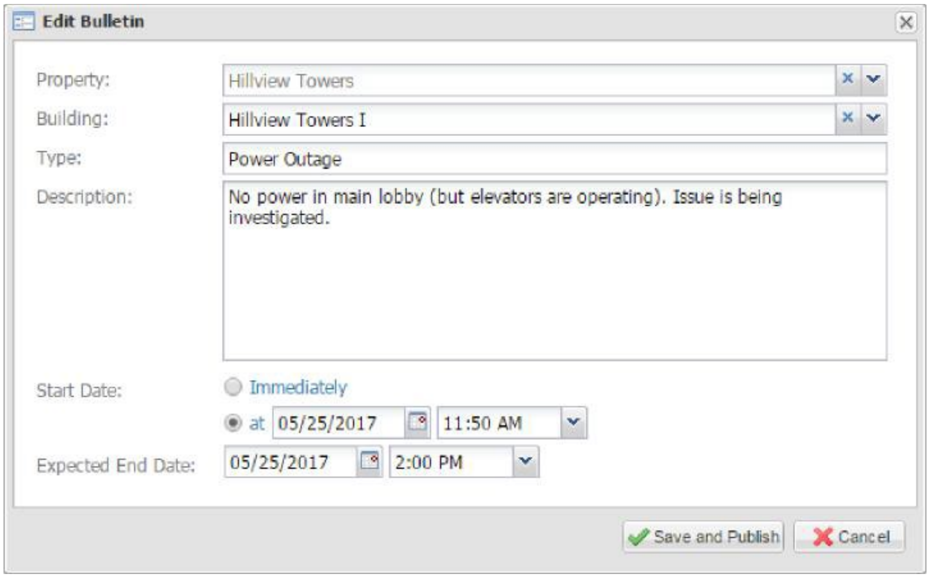
right. Refer to the numbered sections below for additional information on each section of this interface.





1. The Bulletin Information section displays the following: Location (Property/Building), Type, Start Date, Expected End Date, End Date (this field is empty if the bulletin has not been closed), Description

    - If the bulletin does not have a status of **Closed**, then clicking the **Edit** link, or anywhere on the card, will open the Edit Bulletin popup, allowing you to update any of the information displayed.



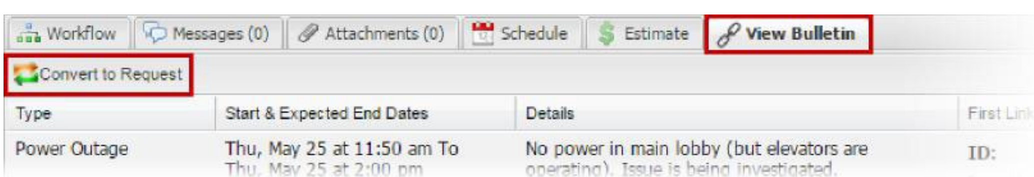
- After making any changes, click **Save and Publish** to update the details of the bulletin.

2. If the bulletin is currently published and has not been closed, clicking **End Bulletin & Complete Requests** will do the following:

    - Set the bulletin's status to Closed. It will no longer appear in the Bulletin section when creating new work orders, and is only displayed in the Bulletins list if the **Show** dropdown is set to All or Closed.
    - Any requests linked to the bulletin will be closed. Any Tenant Contacts associated with these requests will receive an email notifying them that the issue has been resolved if they are subscribed to Request Completed events.
    - Associated work orders are unaffected, and will still need to be closed when work is completed using the usual workflow.

3. The **Work Orders and Requests Linked to this Bulletin** section lists all work orders and requests that have been linked to this bulletin.

    - You can view work order details by clicking on the associated ID number. If there are multiple work orders, any duplicates can be can be converted to a request by opening the work order's details and clicking **Convert to Request** under the **View Bulletin** tab. See the View Bulletin Tab topic for more information.



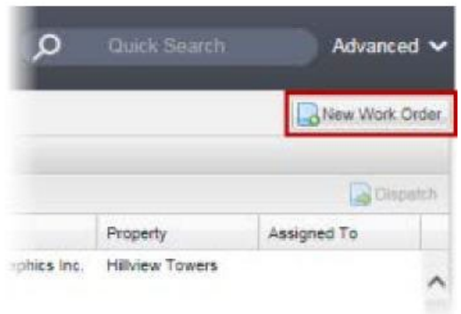
    - Hovering your mouse over the Tenant/Contact listing will display a popup showing contact information.

4. The **History** section displays information concerning the following bulletin status changes: Saved as Draft, Published, Updated, and Closed.

The New TR Work Order Screen (Bulletins)

This topic includes the modified Bulletins workflow. If you are not using Bulletins, see The New TR Work Order Screen instead.

The New TR Work Order screen is used to enter the basic details for a new Tenant Request work order. You can start the process of creating a new work order from any of the Tenant Request Lists highlighted below and clicking **New Work Order**. The New TR Work Order screen is displayed.



If you have Call Center Mode enabled, the Contact Search screen is displayed first, which can be used to search for and select a Tenant Contact. See The Contact Search Screen for additional details.

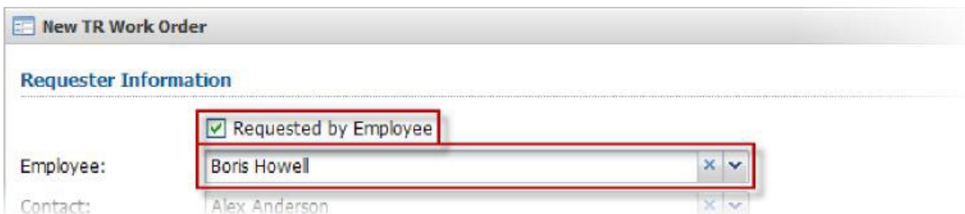
If you have Call Center Mode enabled in your user preferences, you will see a tabbed interface to the right, containing the following information:

- **Contact**: The contact's details are displayed. If needed, you can click on the **Edit** link in any section of the displayed information to update the contact's details, and/or fill in missing information.
- **Tenant:** Tenant information is displayed for the contact you have selected.
- **Location:** This tab displays location information related to the tenant contact, such as property and building details, and coverage hours.
- **Document:** Any content (files or page links) that was added to the Resource Center for the property can be viewed from here.
- **Bulletins:** If your company uses the optional Bulletins feature, then the Bulletin tab is also displayed. Under this tab, any bulletins associated with the property and/or building are displayed here. If a work order is already associated with a bulletin, that information will also be displayed here.

1. If you would prefer to search for Tenant Contact information using the contact search interface, click the **Contact Search** link. See The Contact Search Screen for additional details.

2. If the Work Order has been proactively reported by an employee, click **Requested by Employee**, then click on the drop-down menu and select the employee.

A proactive work order is a work order that was initiated by an employee instead of a tenant; i.e., no tenant has requested this work to be performed. **Proactive work orders are still billable.**



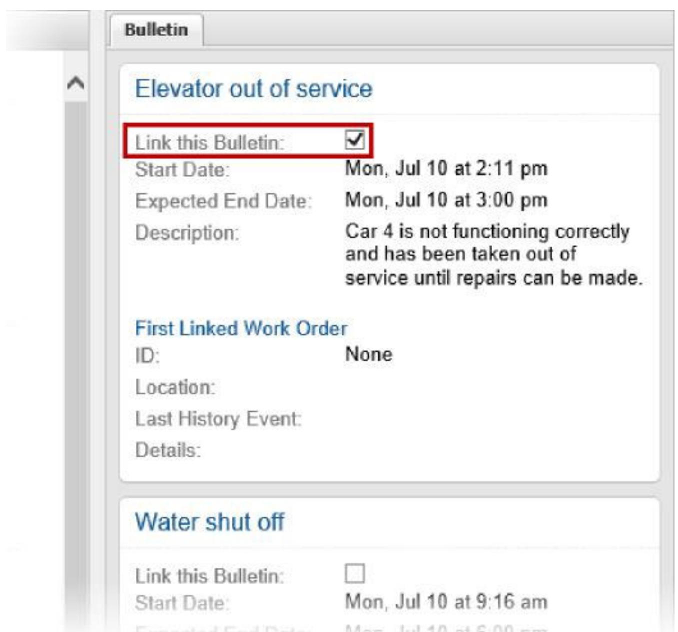
3. If you used the The Contact Search Screen to find the tenant contact, then all required fields for the **Requester Information** and **Work Order** location sections has been pre-populated for you (this information can still be overridden if necessary). If all pre-filled information is correct, skip to Step 6.

3. Click the contact field and enter the contact's name (this information will already be filled in if you made use of the Contact Search screen described above). After entering at least three letters of the contact's name, you will be presented with a drop-down list of possible matches. Select the appropriate contact from the list.

4. Once a contact has been selected, the Tenant and Work Order Location fields are automatically filled in. If needed, the work order location can be overridden by using the drop-down menus provided.

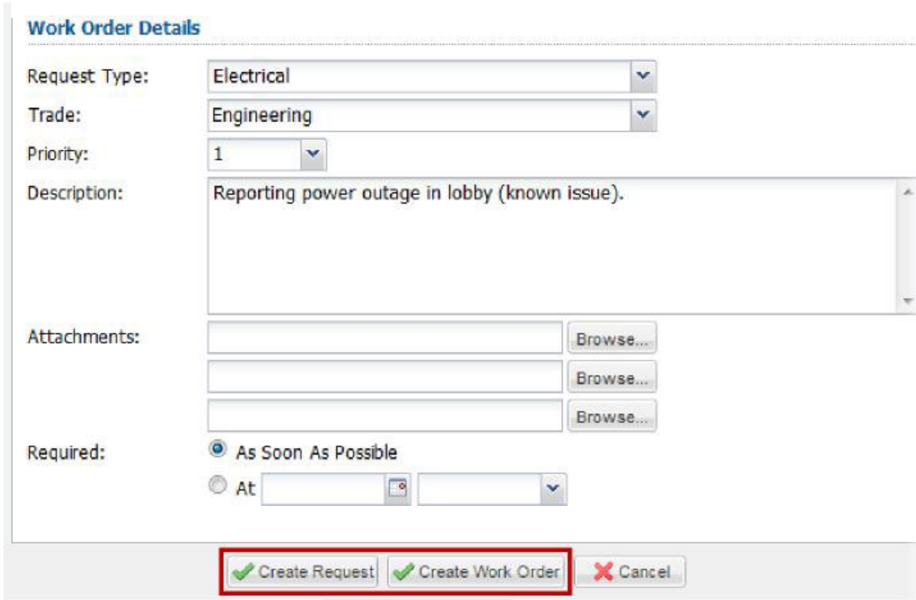
6. If your company uses Bulletins and one or more active bulletins are associated with your tenant's location, this information will be displayed in the **Bulletin** section to the right. If you do not use Bulletins, see Adding a TR Work Order instead.

   - In the **Bulletin** section, all bulletins associated with the tenant's building are listed, including detailed information for each bulletin. If a work order is already associated with a bulletin, it will be indicated here in the **First Linked Work Order** section.
   - If the tenant is reporting an issue related one of the listed bulletins, place a checkmark beside **Link this Bulletin** for the applicable Bulletin.



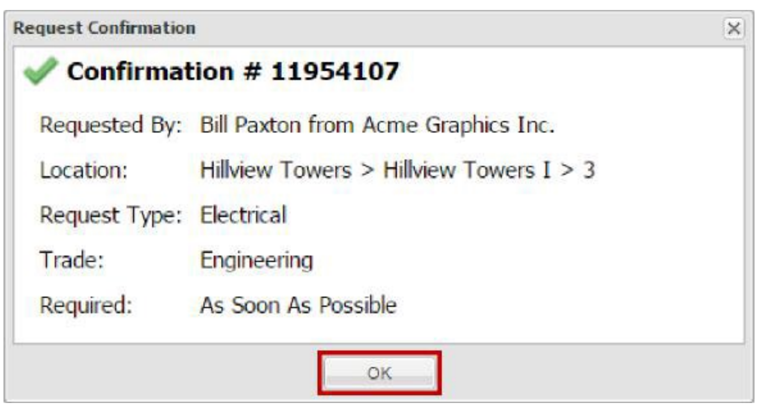
7. Next, continue to the Work Order Details section on the left side of the screen.
8. Using the fields provided, select a **Request Type**, **Trade** and **Priority**.
   - To assist you in finding the correct Request Type, entering a partial name in the Request Type field will display a filtered list. Entering a partial name functions as a "wildcard search", e.g. typing "ele" would match any request type that contains "ele" somewhere in its name.
9. Next, fill in a description for the work order.
10. You can initially add up to three attachments (such as .pdf, .jpg or .doc files) using the **Browse...** buttons to locate files. The total attachment size cannot exceed 10MB; i.e. one file 10MB in size, or 2-3 files whose combined size does not exceed 10MB. For more information on attachments, see About Attachments.

11. In the Required section, select either **As Soon as Possible** or **At** and use the menus provided to select a date and time that the work is required.



12. When you are finished, the options available to you depend on whether the request was associated with a bulletin:

- If the request was associated with a bulletin, you can click **Create Request** to associate this request with the selected bulletin. A confirmation window is displayed. Click **Ok** to complete the operation. The request has been associated with the bulletin, and is displayed on the bulletin's details screen.



- Click **Create Work Order** if the request is not associated with a bulletin, or if the request is associated with a bulletin but the specific issue described is not covered by pre-existing work orders. This will generate the work order and take you to the Work Order Confirmation screen.

The View Bulletin Tab

The View Bulletin tab is only displayed on work orders that are associated with a Bulletin. Under this tab, details of the bulletin are displayed, including the **First Linked Work Order** (the first work order entered into the system that was linked to the bulletin).

If you have determined that the issue described in this work order is already covered by the First Linked Work Order, then you can change the work order into a Request by clicking **Convert to Request**. Requests are linked to the bulletin and are not represented by a Work Order. When the linked Bulletin is closed, any Tenant Contacts associated with these Requests will receive an email notifying them that the issue has been resolved if they are subscribed to **Request Completed** events.

- Work orders **are not closed** when their associated Bulletin is closed. Associated work orders still need to be closed when work is completed using the usual workflow.
- Requests can only be viewed from the Bulletin Details screen.