

Automated Posting allows you to set a frequency at which the system will check for new Work to be posted and posts it automatically. This assumes your database is already configured for manual posting (for more information on this, see the **Posting Work** reference.)

Configuration

Tenants

For any tenant you wish to include in automated posting, complete the following:

- *Include in Automated Posting* – this checkbox must be selected for any Work linked to the Tenant to be included
- *Billing Contact* – a Contact with a valid email address should be linked in order to receive summary reports of cost/charges generated for the tenant following each automated posting
- *Property* – an active Property should be linked (under the **Defaults** tab of the standard form) in order to include the tenant costs/charges in the summary report by property generated following each automated posting

Properties

For each property you are including in automated posting, complete the following under the **Automated Posting** tab:

- *Work Error Recipients* – specify one or more email addresses (comma-separated) to receive notice of any errors with posting Work linked to the current property
- *Work Error Email Subject* – specify the subject of the email to be sent to the above recipients
- *Work Error Email Body* – (optional) link a paragraph with header text to precede any errors produced by the system
- *Work Error Email Closing* - (optional) link a paragraph with header text to follow any errors produced by the system

- *Posting Summary Recipients* – specify one or more email addresses (comma-separated) to receive a summary of costs/charges by tenant for all tenants linked to the current property
- *Summary Email Subject* – specify the subject of the email to be sent to the above recipients
- *Summary Email Body* – (optional) link a paragraph with header text to precede the system-generated summary
- *Summary Email Closing* - (optional) link a paragraph with header text to follow the system-generated summary

Work Transactions

Configure the settings under the **Automated Posting** tab of Work Transaction Preferences:

- *Timer Active* – select this once all settings have been configured correctly
- *Frequency* – select the frequency for automatically posting work (Daily, Weekly, Monthly)
- *Time of Day* – enter the time of day at which Work will be posted (should be off-hours)
- *Commencement* – select the date to start the automated posting; the process will continue based on the *Frequency* and *Time of Day* specified
- *Modify Search* – enter any search criteria to narrow down the Work to be posted, otherwise it will look to include all non-posted work linked to the included tenant(s) within your database

Contact your Client Success Manager for assistance on configuring the system for automated posting.

Automated Posting

With the above settings in place, the system should automatically post all Work records satisfying the search criteria on the frequency specified. The appropriate Work Transaction records will be created; you can tell they were automatically generated because the *Batch Number* will be prefaced with “AP” and the *Posted By* value will be “AUTOMATED”.

Additionally, for each automated posting, following are the notifications which will be generated.

System Log

A new entry will be created for “Automated Posting Timer” with the details “Processing Finished”. If there were any errors which prevented posting (incorrect Work Transaction settings or Work missing a Property), this will be noted here as well.

Work Error Report by Property

For each property linked to Work, it will generate an email to the *Work Error Recipients* specified for the property which includes:

- *Work Error Email Body* text referenced
- List of all errors which prevented posting for any Work linked to the given property, including any Work Validation violations or missing cost/charge accounts
- List of all warnings which do not prevent posting but may impact the ability to send out the proper notification, e.g. if a tenant does not have a Billing Contact, a Summary by Tenant will not be generated for them; if a tenant does not have a Property linked, it will not be included in the Posting Summary by Property
- *Work Error Email Closing* text referenced

Posting Summary by Property

For each property linked to Work, it will generate an email to the *Posting Summary Recipients* specified for the property which includes:

- For each tenant, lists the summary of charges followed by the summary of costs (if both are included) per Work. For each Work record, it displays the Number, Work Type, and total charge/cost. Note there may be multiple Work records referenced per tenant.

Summary Report by Tenant

For each tenant included, it will generate an email to their *Billing Contact* which includes:

- *Summary Email Body* text referenced on the tenant’s linked property
- For each tenant, lists the summary of charges followed by the summary of costs (if both are included) per Work. For each Work record, it displays the Number, Work Type, and total charge/cost. Note there may be multiple Work records referenced.
- *Summary Email Closing* text referenced on the tenant’s linked property

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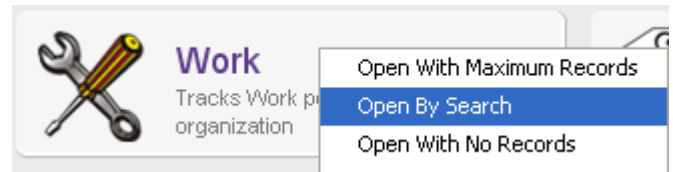
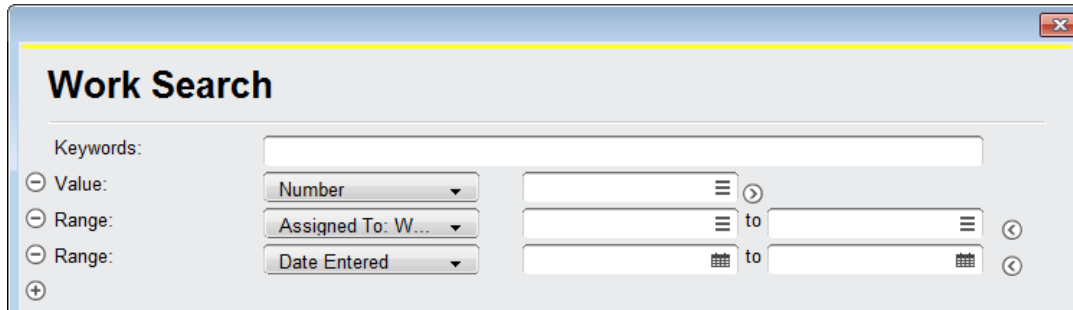
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- *Summary Email Closing* text referenced on the tenant’s linked property

Right-click on **Work** and select **Open By Search**.

Enter search criteria to bring up the records you need to review/complete, *Typically Work Status Type **Open to Open***.

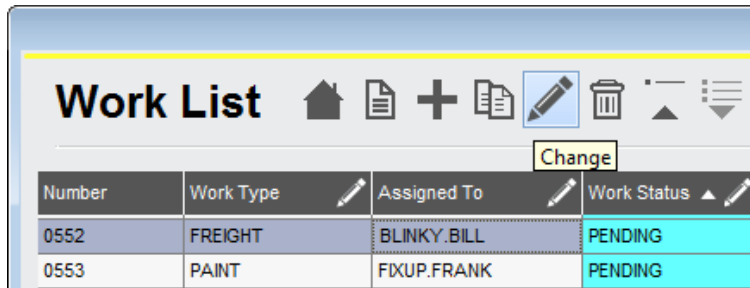



The 'Work Search' dialog box contains a 'Keywords:' field and three filter sections. The first filter is 'Value:' with a dropdown set to 'Number'. The second filter is 'Range:' with a dropdown set to 'Assigned To: W...'. The third filter is 'Range:' with a dropdown set to 'Date Entered'. Each filter section includes a search icon and a 'to' field with a calendar icon.

HINT: create a Recordset to make accessing your open work quick and easy. Refer to our Recordset Quick Reference.

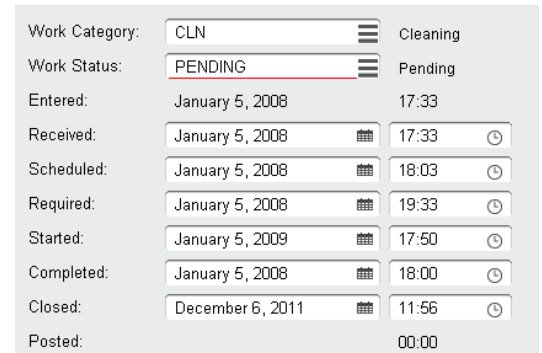
Highlight the work record you want to adjust/complete and click **Change** from the Toolbar or double-click on the record and select the Change icon.

Enter information into the following fields (in the upper right-hand corner on the standard form):



The 'Work List' table has a toolbar with icons for home, print, add, edit, delete, and refresh. A 'Change' button is highlighted over the 'Work Status' column of the first row.

Number	Work Type	Assigned To	Work Status
0552	FREIGHT	BLINKY.BILL	PENDING
0553	PAINT	FIXUP.FRANK	PENDING



The standard form fields include: Work Category (CLN - Cleaning), Work Status (PENDING - Pending), Entered (January 5, 2008 17:33), Received (January 5, 2008 17:33), Scheduled (January 5, 2008 18:03), Required (January 5, 2008 19:33), Started (January 5, 2009 17:50), Completed (January 5, 2008 18:00), Closed (December 6, 2011 11:56), and Posted (00:00).

• Work Status

- PENDING** The work is on hold (i.e. waiting for a part).
- COMPLETED** The work has been finished (but not all billable information has been recorded).
- CLOSED** The work is completed and all details are recorded if billable it is ready to be billed.

• Dates/Times

Entered, Received, Scheduled and Required typically will have defaulted during work entry. The following dates/times should default when the work order is changed to a Closed status type. You do not have to manually enter these unless there are no Time details for the work record.

- Started** When work began (based upon the earliest time record in the Time detail tab)
- Completed** When the work was finished (based upon the latest time record in the Time detail)
- Closed** This will default for you (to the current Date/Time) when you change the work status to CLOSED. Only change the work order to CLOSED if all of the details have been entered and (if billable) it is ready to bill your tenant.

Enter information into the following fields:

- **Description:** Review Description and edit if necessary.

The contents of the Description field typically appear on the AwareManager Portal pages.

- **Notes:** Record any details regarding the work in the Notes field. Typically this is used to record what action was taken to resolve the issue.

The contents of the Notes field may appear on the AwareManager Portal pages.

- **Work Details:** Enter details in the tabs at the bottom of the work record; Time, Materials and Vendors.
 - Charge rates will only default on work orders with the Billable checkbox checked.
 - Even if the work order is non-billable, enter the values to record cost details.
 - If the Charge field defaults you can clear the amounts for non-billable work orders.

Start Date	Contact	Work Type	Start Time	End Time	Time Type	Total Time	Description	Hourly Charge	Hourly Cost	Total Charge	Total Cost
January 5, ...	CARVER, J	CLEAN	17:50	18:00	REG	0.167	Cleanin...	40.0000	35.0000	\$6.68	
						0.000		0.0000	0.0000	\$0.00	

Material	Description	Purchase	Quantity	Unit Price	Charge	Unit Cost	Cost	Inventor
COPPER PIPE	Copper Pipe	00001	1.000	20.0000	\$20.00	15.8700	\$15.87	
MOTOR OIL	Motor Oil		2.000	7.8000	\$15.60	7.8000	\$15.60	

Vendor	Description	Purchase	Charge	Cost
PLUMB TIME	Plumb Time		\$1,200.00	\$0.00

Save the changes by clicking on the Save icon when you are done.

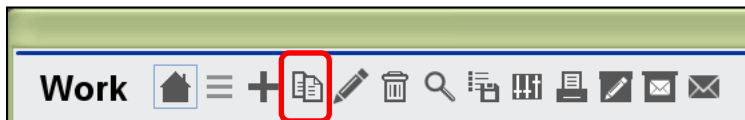
TIP: Enter the Invoice number for any Vendor Invoices into the Description field.

Posted work records cannot be edited, but it is still occasionally necessary to make corrections on posted work. This can be easily achieved using the tools already provided within the AwareManager database.

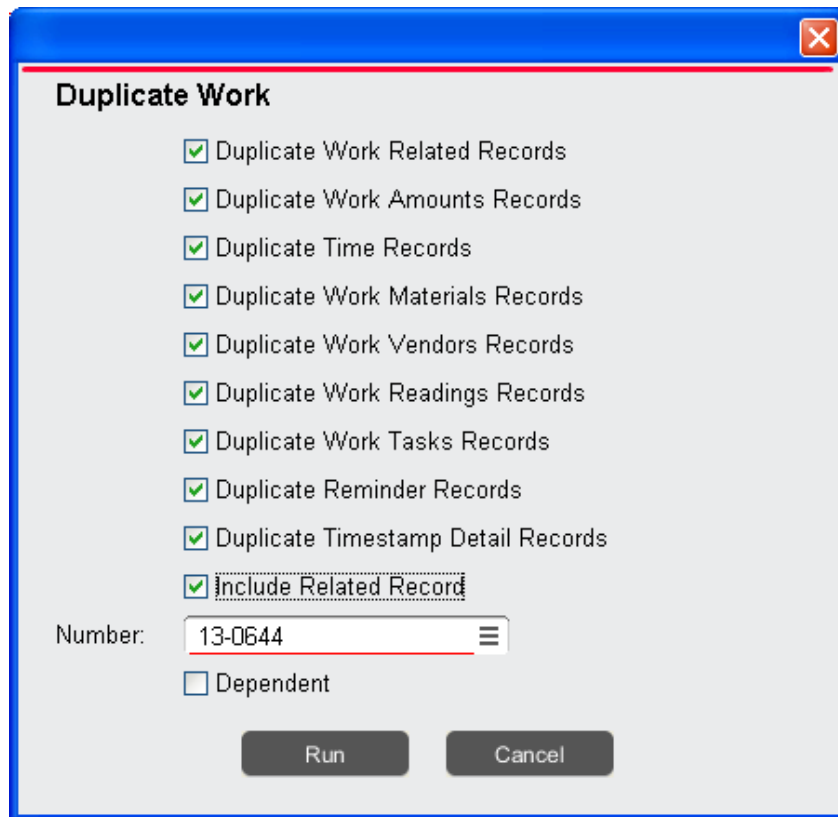
This process provides a clear paper trail that accomplishes three things: preserving the original record, negating the incorrect information, and providing correct information.

To negate the incorrectly posted work:

1. Open the posted work record for which you would like to make corrections.
2. Click the **Duplicate Work** button in the operations menu at the top of the work record:



3. In the resulting pop-up box labeled “Duplicate Work,” make sure all boxes except for “Dependent” are checked, and then click Run. This will create a new, editable record with the information for the old record already in place.



4. Go through the work record and negate all dollar amounts by placing a minus sign (-) in front of either the quantity or the dollar amount. Dollar amounts are entered in several places in a typical work record. You will need to check all of the following tabs to make sure you correctly negate all dollar amounts:

- **Time** – for each line of time entered, you must remove the values for each field in the Start Time and End Time columns, and place a minus sign in front of the value in each field in the Total Time column.
- **Materials** – for each line under materials, place a minus sign in front of the value in the Quantity column.
- **Vendors** – place a minus sign before any values in the Charge and Cost columns.
- **Additional Amounts** – place a minus sign before any values in the Charge and Cost columns.

Note: to double-check that you have negated all amounts correctly, compare the Total Amounts tab of this record to the original. Every item that has a \$0.00 value in the old record should have a \$0.00 value in the new one. For each item in the old record with a dollar amount other than \$0.00, the new record should have the negative of that amount. Take special care that the Total Charge and Total Cost values match each other in this way.

< Custom Fields Related Total Amounts Additional Amounts Time Materials Vendors Readings Tas			
Account	Description	Charge	Cost
		2500.00	\$0.00

< Custom Fields Related Total Amounts Additional Amounts Time Materials Vendors Readings T			
Account	Description	Charge	Cost
		-2500.00	\$0.00

5. Make sure to carefully check the work record for any errors or missing information. Set the work status to **CLOSED**, and then save the work record.

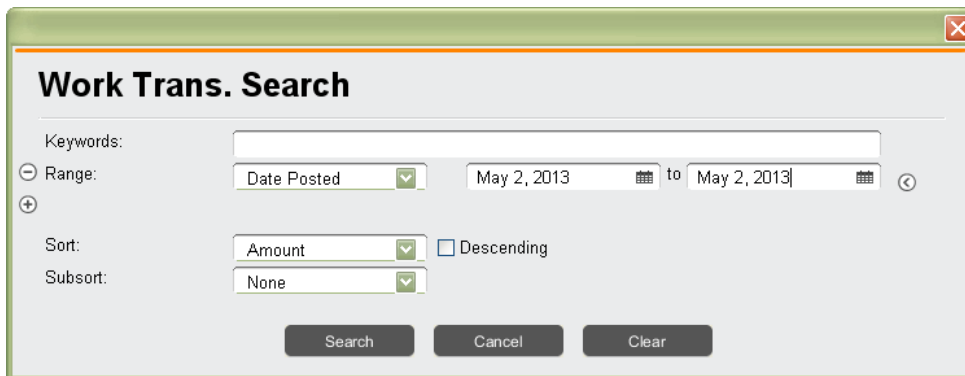
To make corrections:

1. Open the original record and **Duplicate Work** again. You will use the same settings used the first time the record was duplicated.
2. In the new record, make all necessary corrections to the information.
3. Carefully double check the work record for any errors or missing information, then set the work status to **CLOSED**. Save the record.
4. Post both of the newly-created records as you normally would, but do not export the batch file.

For more information on posting, see [Posting.pdf](#).

To generate and export the corrected batch file:

1. From the console, go to the **Financial** tab and right-click **Transactions**. Choose **Open by Search**.
2. Search for records by **Date Posted** to pull up the transactions list. This should be the list you would normally export.



Work Trans. Search

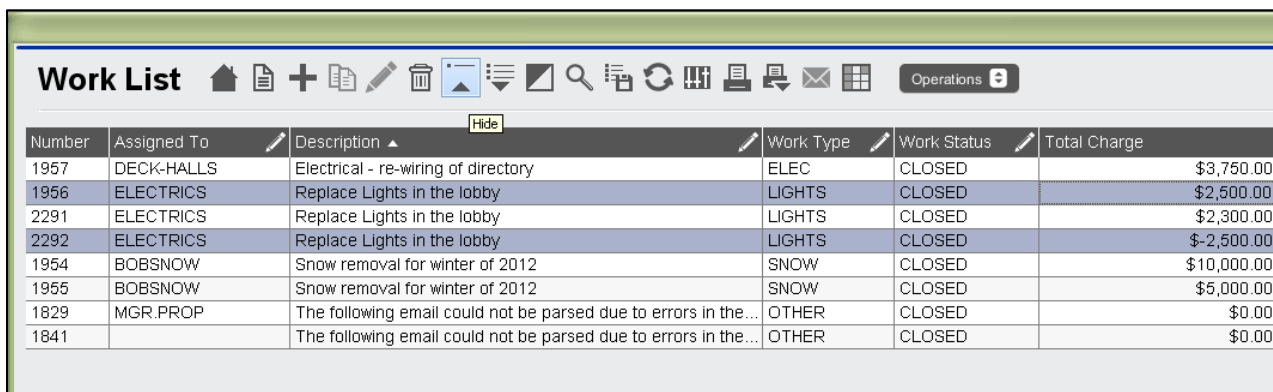
Keywords:

Range: to

Sort: Descending

Subsort:

3. In this list, you will need to find the transactions for the incorrect work record and its negative. Once you have found them, hide them from the list.



Number	Assigned To	Description	Work Type	Work Status	Total Charge
1957	DECK-HALLS	Electrical - re-wiring of directory	ELEC	CLOSED	\$3,750.00
1956	ELECTRICS	Replace Lights in the lobby	LIGHTS	CLOSED	\$2,500.00
2291	ELECTRICS	Replace Lights in the lobby	LIGHTS	CLOSED	\$2,300.00
2292	ELECTRICS	Replace Lights in the lobby	LIGHTS	CLOSED	\$-2,500.00
1954	BOBSNOW	Snow removal for winter of 2012	SNOW	CLOSED	\$10,000.00
1955	BOBSNOW	Snow removal for winter of 2012	SNOW	CLOSED	\$5,000.00
1829	MGR.PROP	The following email could not be parsed due to errors in the...	OTHER	CLOSED	\$0.00
1841		The following email could not be parsed due to errors in the...	OTHER	CLOSED	\$0.00

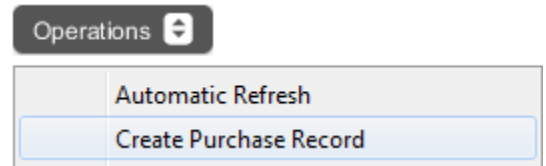
4. Now you have a complete set of transactions for the posted work, including the transaction information for your corrected work record.
5. Export the file as usual.

The **Create Purchase Record Operation** in the AwareManager allows you to create a new Purchase record from the Work list based upon a Work record.












When selected, the new Purchase record will automatically default information such as *Vendor, Client, Property, Unit, Department, Materials, Work Number, Contract, Project and Paragraph* from the highlighted Work record.

Access this Operation by clicking on the Operations button in the Work list. You can only have one Work record selected at a time.

Example Work Record:



Work

Number:	3704	006AR	<input type="checkbox"/> Posted
<u>Client:</u>	AVG	America's Vacation Gr...	<u>Work Category:</u> OTH Other
<u>Work Contact:</u>	DALE.CLYDE S.	Clyde S. Dale	<u>Work Status:</u> SCHEDULED Work Assigned and Sc...
Phone:			Entered: April 27, 2010 18:50
<u>Property:</u>	6 ARLNGTN	6 Arlington Street	Received: November 15, 2012 15:21
<u>Unit:</u>	6 ARLNGTN-B	Basement	Scheduled: November 15, 2012 15:21
Floor:	floor		Required: November 15, 2012 15:21
Room:	MECH		Started: 00:00
<u>Department:</u>	ENG	Engineering	Completed: 00:00
<u>Work Type:</u>	CARPENTRY	Carpentry	Closed: 00:00
<u>Priority:</u>	1-IMMED	Immediate Priority - wit...	Posted: 00:00
<u>Worker:</u>	ENG	Engineer	<input type="checkbox"/> Billable
Description:	Weekly Generator Test - Summer Months Only		Notes: notes

Purchases




<
Custom Fields
Related
Total Amounts
Additional Amounts
Time
Materials
Vendors
Readings
Tasks
Other Links
Mitigation
Timestamps
Files
R
>

Material	Description	Purchase	Quantity	Unit Price	Charge	Unit Cost	Cost	Inven
MOTOROIL	Motor Oil		3.000	7.8000	\$23.40	0.0000	\$0.00	
VENDING	Snack and Drink Machines		7.000	798.0000	\$5,586.00	0.0000	\$0.00	

« < 1/1 > »
Available Records: 6054

When this operation is selected, a new Purchase record will open (with defaulted information):

Purchase

Request Number: 08-0109	006AR	PO Number:
Purchase Type: BUILDING	Building Purchase	Total: \$0.00
Purchase Status: REQUEST	Request	Date Approved:
Vendor:		Time Approved:
Client: AVG	America's Vacation Gr...	Date Ordered:
Property: 6 ARLNGTN	6 Arlington Street	Time Ordered:
Unit: 6 ARLNGTN-B	Basement	Delivery:
Department: ENG	Engineering	Tracking Number:
Bill To:	6 Arlington Street Boston, MA 02115	Customer Number:
Deliver To:	6 Arlington Street Boston, MA 02115	Description:
		Notes:

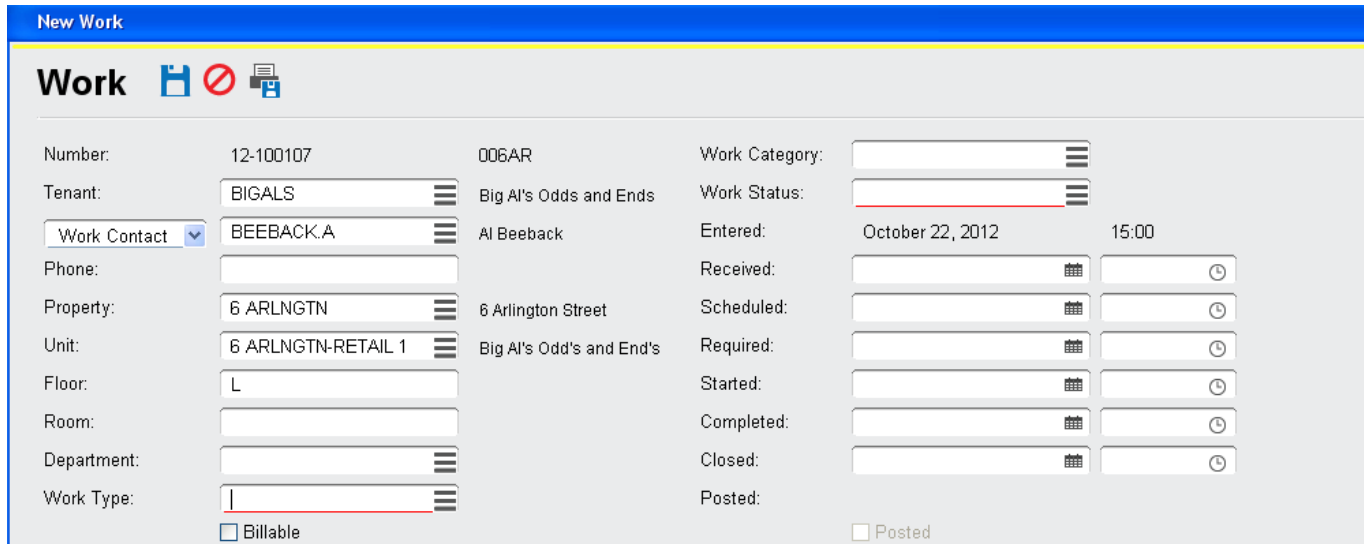
< Custom Fields Materials Additional Amounts **Approval** Dates Other Links Reminders >

Permission	Threshold	Approver	Date Approved	Time Approved	Purchase Status	Include On Report
FULLACCESS	1,000.000				APPROVAL3	<input checked="" type="checkbox"/>
PM	500.000				APPROVAL2	<input checked="" type="checkbox"/>
ENG	100.000				APPROVAL1	<input checked="" type="checkbox"/>
	0.000					<input type="checkbox"/>




Available Records: 0

When you have finished filling out the Purchase record, click the green checkmark and the record will be added to the Purchase capsule.

When entering information into AwareManager, some information will enter itself for you in a process called **defaulting**. The following is a detailed description of this process in terms of how it relates to adding work records.



New Work

Work   

Number: 12-100107 006AR Work Category:

Tenant: BIGALS Big Al's Odds and Ends Work Status:

Work Contact: BEEBACK.A Al Beeback Entered: October 22, 2012 15:00

Phone:

Property: 6 ARLNGTN 6 Arlington Street Received:

Unit: 6 ARLNGTN-RETAIL 1 Big Al's Odd's and End's Scheduled:

Floor: L Started:

Room:

Department:

Work Type:

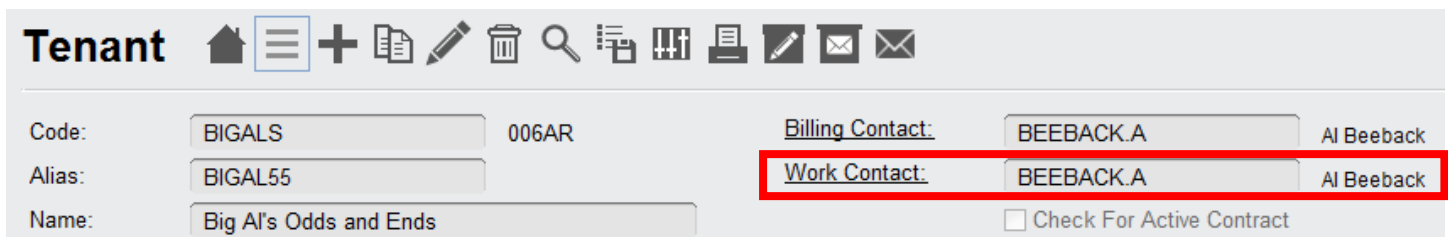
Billable Posted












When you first add a new Work record most of the fields are blank. After you enter the first piece of information (e.g. the Tenant code *BIGALS*) and press Tab, some fields default including the *Work Contact*, *Property*, *Unit* and *Floor*. You can change defaulted information at any time.

The Tenant code entered was *BIGALS* and all of the information about who called (*BEEBACK.A*) and where he is located (*6 ARLNGTN*) filled in automatically – this is called **DEFAULTING**.

1. AwareManager looks up the Tenant record that is entered.
2. If there is a value in the *Work Contact* field it defaults onto the work order.

This is how Al Beeback appeared on the work order without us having to enter his name.



Tenant           














Code: BIGALS 006AR Billing Contact: BEEBACK.A Al Beeback

Alias: BIGAL55 Work Contact: BEEBACK.A Al Beeback

Name: Big Al's Odds and Ends Check For Active Contract

Note: If the *Work Contact* field is blank on the Tenant record – it will default the combo box in the Work order to *Work Contact* and then prompt the user to select from a list of Contacts for the Tenant.

3. Then, it looks up the *Contact* record.
4. If there is a value in the *Phone*, *Property* and *Unit* fields it defaults them onto the Work order.

Contact             








Code:	<input type="text" value="BEEBACK.A"/> 006AR	Phone:	<input type="text"/>
Alias:	<input type="text"/>	Home Phone:	<input type="text"/>
Name:	<input type="text" value="Al Beeback"/>	Fax:	<input type="text"/>
Title:	<input type="text"/>	Cell Phone:	<input type="text"/>
Salutation:	<input type="text" value="Dear Al Beeback"/>	Address:	<input type="text" value="6 Arlington Street"/>
Email:	<input type="text"/>	City:	<input type="text" value="Boston"/>
<u>Tenant:</u>	<input type="text"/>	State:	<input type="text" value="MA"/>
<u>Property:</u>	<input type="text" value="6 ARLNGTN"/> 6 Arlington Street	Zip Code:	<input type="text" value="02115"/>
<u>Unit:</u>	<input type="text" value="6 ARLNGTN-RETAIL 1"/> Big Al's Odd's and End's	Country:	<input type="text"/>
Floor:	<input type="text"/>		
Room:	<input type="text"/>		

This is where Al's *Name* is stored, and where the *Property* and *Unit* came from that appeared on the Work order.

Notes:

- If the telephone number is blank on the Contact record – it will default the telephone number from the Client record.
 - If the Property and/or Unit fields are blank on the Contact record – nothing will default onto the Work order (unless the Client is linked to a single Unit record)
5. AwareManager then looks at the *Unit* record. If there is a value in the *Floor*, *Room*, and *Description* fields – it defaults them onto the Work order.

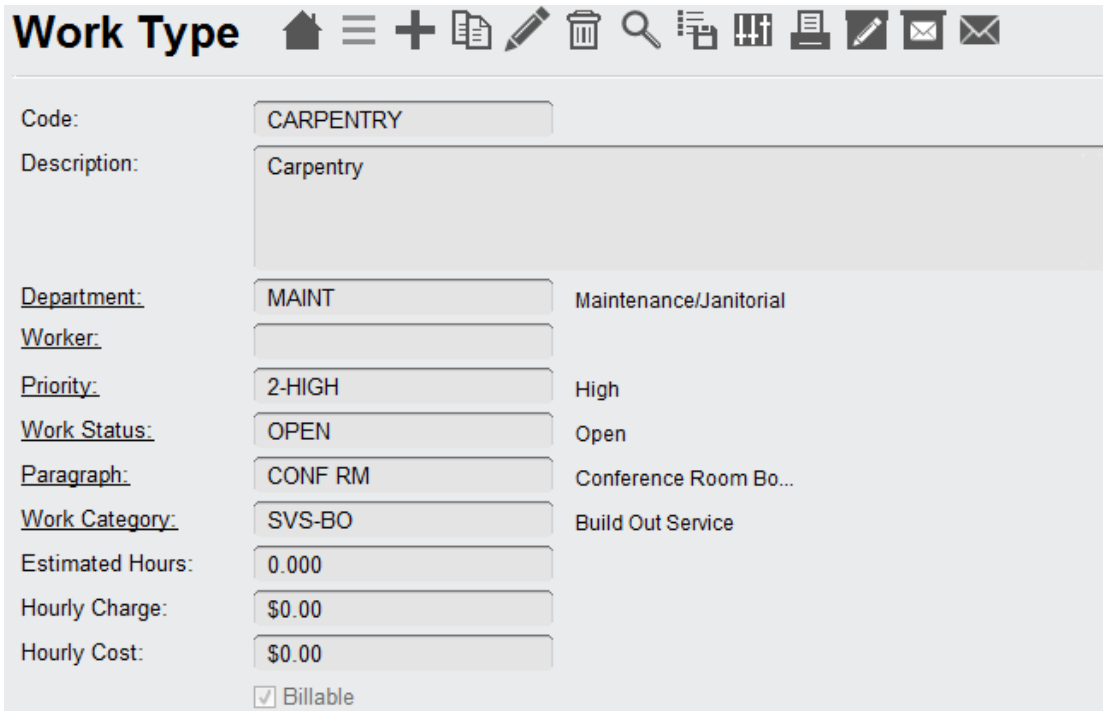
This is how Floor L and Big Al's Odd's and End's appeared on the work order.


Unit       

Code:	<input type="text" value="6 ARLNGTN-RETAIL 1"/>
<u>Property:</u>	<input type="text" value="6 ARLNGTN"/>
Number:	<input type="text" value="RETAIL 1"/>
Floor:	<input type="text" value="L"/>
Room:	<input type="text"/>
<u>Contact:</u>	<input type="text" value="BEEBACK.A"/>
Square Footage:	<input type="text" value="0"/>
Description:	<input type="text" value="Big Al's Odd's and End's"/>

Now let's review the **defaulting** behavior for the rest of the Work Entry screen.

6. A *Work Type* code is entered and AwareManager looks up that work type record.
7. If there are values in the *Department*, *Worker*, *Billable* and *Priority* fields, it defaults them onto the work order.



Work Type 

Code:

Description:

Department: Maintenance/Janitorial

Worker:

Priority: High

Work Status: Open

Paragraph: Conference Room Bo...

Work Category: Build Out Service

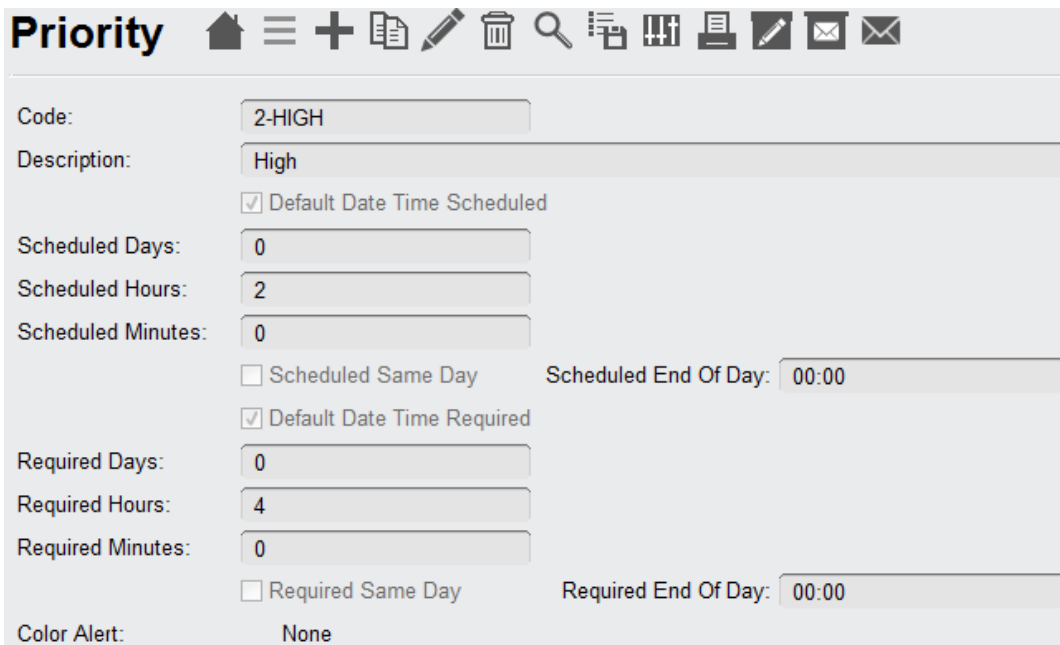
Estimated Hours:


Hourly Charge:

Hourly Cost:

Billable

8. Then, AwareManager looks at the information in the *Priority* record. It looks at the definition of the priority in order to determine the *Scheduled Date and Time* and the *Required Date and Time*.



Priority 

Code:

Description:

Default Date Time Scheduled

Scheduled Days:

Scheduled Hours:

Scheduled Minutes:

Scheduled Same Day Scheduled End Of Day: 00:00

Default Date Time Required

Required Days:

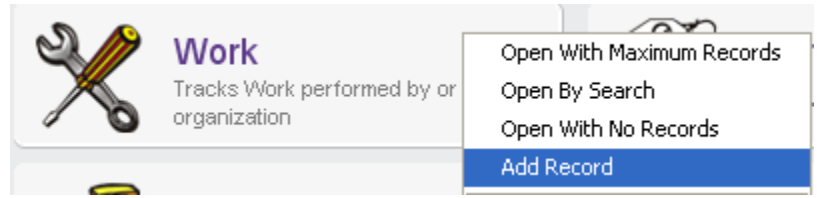
Required Hours:

Required Minutes:

Required Same Day Required End Of Day: 00:00

Color Alert:

1. Right-click on **Work** and select **Add Record**, or **Open By Search** and click **New** from the list/form.

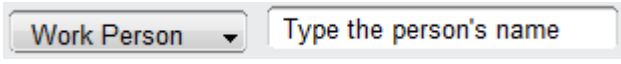


2. Enter information into the following fields:



The top of the Work window records WHO and WHERE:

Number:	0061	006AR
Tenant:	ONEWAY	The One Way Company
Work Contact:	REVER.P	Paul Rever
Phone:	617-767-3427	
Property:	6 ARLNGTN	6 Arlington Street
Unit:	6 ARLNGTN-300	Suite 300
Floor:		
Room:		

Client or Tenant	To bring up the list of Clients/Tenants, enter the first few characters of the name and press Tab. Select from the list by double-clicking or highlight and press Tab. Note: In most cases the following fields will default once you Tab out of the Client/Tenant field: Contact, Phone, Property, Unit, Floor and Room.
Work Contact	If the wrong contact defaulted, update the field accordingly. To bring up the list of Contacts, enter the first few characters of their last name and press Tab. Select from the list by double-clicking the record or highlighting the record and pressing Tab. If the person is not in the Contact list - change the field title from <u>Work Contact</u> to Work Person by clicking on the <u>down arrow</u> . Then type the person's name in the field. 
Phone	This should default; if it is incorrect or blank adjust it accordingly. Enter the number of the person reporting the work or the number where work is to take place.

Unit	This should default based upon the client/tenant; if it is incorrect or blank adjust it accordingly. Note: If the Unit is not in the list, select the record for the floor and use the Room field to record the Unit.
Floor	The Floor field will default based upon the Unit.
Room	The Room field can be used to further describe the location (kitchen, conf room, etc). All these values should reflect where the work will be performed.

Reminders:
 Use the Tab key to move from one field to the next - Use Shift / Tab to move backwards through the fields.
 Selecting Enter will save the record (or you can click the green checkmark).
 Fields outlined in red are mandatory.

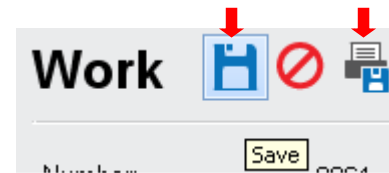
3. Enter information into the following fields:

The second part of the Work window records **WHAT, WHO (the work will be assigned to), and WHEN.**

Work Type	Select the code for the type of work needed to resolve the issue. Note: If you are not sure of the code, type the first few characters and press Tab.
Assigned To: Worker	Most of your work orders will be assigned to Workers (staff). If the work is assigned to a vendor change the field title to Vendor and choose the appropriate vendor from the list.
Priority	This will default based upon the Work Type, you can adjust if necessary.
Description	Enter the specific information regarding the work. Note: this information will typically be shown to the clients on the Portal Pages.
Notes	Typically this field is left blank; as it is used at completion to record details related to the work that was performed.
Work Category	This will default based upon the Work Type, you can adjust if necessary.
Work Status	This will default based upon the Work Type, you can adjust if necessary.

Number:	0061	006AR	<input type="checkbox"/> Posted
Tenant:	ONEWAY	The One Way Company	Work Category: CLN Cleaning
Work Contact:	REVER.P	Paul Rever	Work Status: CLOSED Work is done, inspect
Phone:	617-767-3427		Entered: January 9, 2008 15:38
Property:	6 ARLNGTN	6 Arlington Street	Received: January 9, 2008 15:38
Unit:	6 ARLNGTN-300	Suite 300	Scheduled: January 10, 2008 15:38
Floor:			Required: January 11, 2008 15:35
Room:			Started: January 11, 2008 10:20
Department:	CLN		Completed: December 3, 2011 12:05
Work Type:	CLEAN	Cleaning	Closed: December 6, 2011 16:00
Priority:	3-LOW	Low	Posted: 00:00
Worker:	ENG1	Eng 1	<input type="checkbox"/> Billable
Description:	need the carpets to be steam cleaned		Notes:

Save the changes by clicking on the **Save** icon when you are done.
To **Save and Print** click the **Save and Print** icon.



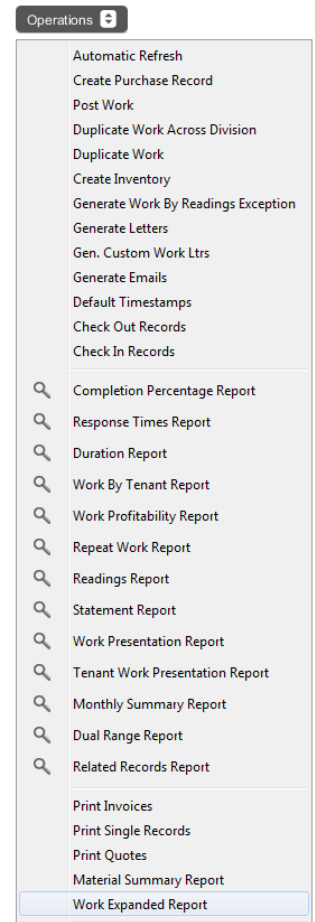
The Expanded Reports in AwareManager are based on the records and columns currently displayed in your list.

Access this report from the **Operations** menu in the following capsules and select **Expanded Report**:

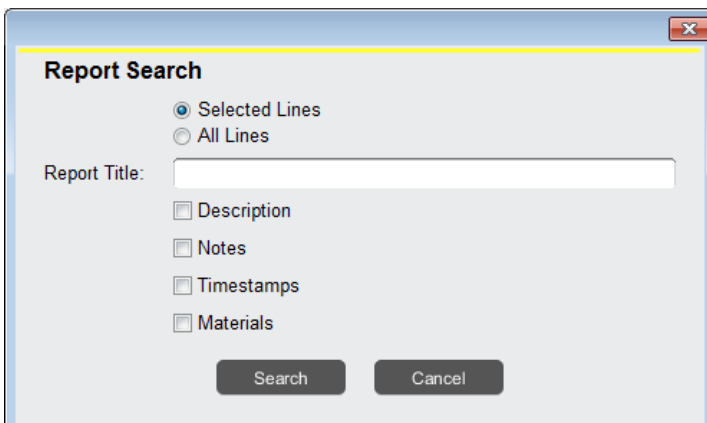
- Work
- Maintenance
- Insurance
- Inventory
- Reminders

Based on the Capsule you are in, the Expanded Report gives you a few various search options:

- Choose to print either “Selected Lines” or “All Lines” in the list.
- In some capsules you may enter a customized title for your report.



Based on the information in each capsule, you are given checkboxes to add additional fields to your report, even if they do not appear in your list:



- Work (Description and Notes)
- Maintenance (Description, Notes, Task, and Materials)
- Insurance (Notes and Coverages)
- Inventory (Paragraph and Description)
- Reminders (Notes)

These reports sort based on the sort in your list.

Example of the Work Expanded Report:

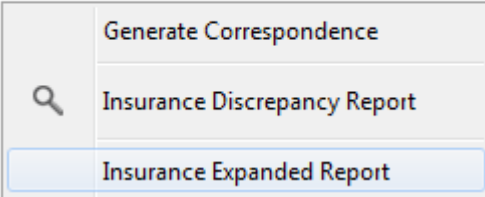
Division	Number	Work Status	Time Entered	Time Received	Date Entered	Work Type	Client
010ST	0019	OPEN	19:04	19:04	January 7, 2008	HVAC-HOT	CLOUSEAUS
	Description: Too hot						
010ST	0023	OPEN	19:06	19:06	January 7, 2008	HVAC-HOT	JOHNSONBR...
	Description: Too hot; The office is very hot.						
010ST	0034	OPEN	09:54	09:54	January 9, 2008	FREIGHT	JOHNSONBR...
	Description: We will need to reserve the use of the Freight Elevator for this Thursday - due to some new furniture being delivered						
010ST	0064	OPEN	15:43	15:43	January 9, 2008	ELEC	PARKSPAGO...
	Description: there will need to be some ice remover used on the side walk- and snow shoveled in the back lot						
010ST	0071	OPEN	11:45	11:45	January 14, 2008	FREIGHT	JOHNSONBR...
	Description: we will need to reserve use of the freight elevator for a half hour today at 1330-1400						
010ST	12-100022	OPEN	12:34	12:34	September 21, ...	BOOKING	JOHNSONBR...
	Description: New work record - how does it print?						
	Materials:						Quantity
	Code	Description					
	TELEVISION	Television					0.000
	SCREEN	Screen					0.000
	MONITOR	Monitor					0.000
010ST	12-100023	OPEN	12:38	12:34	September 21, ...	BOOKING	JOHNSONBR...
	Description: New work record 2 - how does it print?						
010ST	12-100037	OPEN	18:30	15:43	October 4, 2012	ELEC	JOHNSONBR...
	Description: there will need to be some ice remover used on the side walk- and snow shoveled in the back lot						
010ST	12-100038	OPEN	18:30	11:45	October 4, 2012	FREIGHT	PARKSPAGO...
	Description: we will need to reserve use of the freight elevator for a half hour today at 1330-1400						
	Materials:						Quantity
	Code	Description					
	BALLAST R-1600	Ballast R-1600					2.000
	LUMBER-2X4	Lumber - 2x4 (priced per foot)					2.000

Printed Thu Nov 8 15:41:40 EST 2012

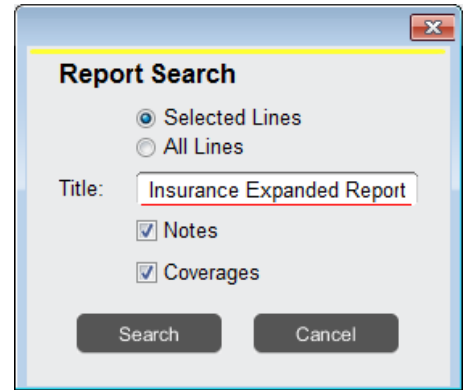
Page 1 of 3

Insurance Expanded Report


Access this report through the Operations menu in the Insurance Capsule.



Use the Report Search window to define the data you want shown on your report. Choose from Selected lines or All Lines, create a custom Title, and choose whether or not you want Notes and Coverages displayed on the report.



Example of an Insurance Expanded Report:

 Insurance Expanded Report DIG Property Group 50 Congress Street Boston, Massachusetts 02109									
Number	Division	Property	Insured Party	Contact	Phone	Insurer	Date Issued		
Coverage	Policy		In Force From	In Force To	Occurrence	Limit Amount	Required Amount		
0004	100BE	100 BEACON	The Bug Be Gone Co...	HOLMES.BUGSY	1-800-BUG-GONE	UMBRELLA	January 1, 2012		
Notes: Testing notes									
GL	1234-45		January 1, 2008	December 31, 2012	each	1,000,000.00	1,000,000.00		
WC	5556-89899		December 1, 2007	December 1, 2012	each	800,000.00	750,000.00		
0005	100BE	100 BEACON	ABC Lighting Compa...	BRITE.JACK		INSUREDPRO	January 1, 2008		
Notes: asdf									
WC	1234-45		January 1, 2008	December 31, 2012	each	100,000.00	75,000.00		
GL	5556-89899		December 1, 2007	November 30, 2012	each	1,000,000.00	1,000,000.00		
AUTO	54321		July 1, 2007	June 30, 2012	each	250,000.00	500,000.00		
0008	100BE	100 BEACON	Paint Me Happy (PAI...	ROLLER.FRANK		INSUREDPRO	February 1, 2008		
GL	GL-99089777		March 1, 2008	March 1, 2013	each	2,000,000.00	1,500,000.00		
WC	WC-00987-112		February 1, 2008	February 28, 2013	each	1,000,000.00	750,000.00		
0018	100BE	100 BEACON	Build It Up Constructi...	DIGGER.DAN	1-800-BUI-LDIT	ATLANTIC	August 1, 2009		
GL	44556688989		August 1, 2009	August 1, 2012	1000000	10,000,000.00	50,000,000.00		

Records printed: 4

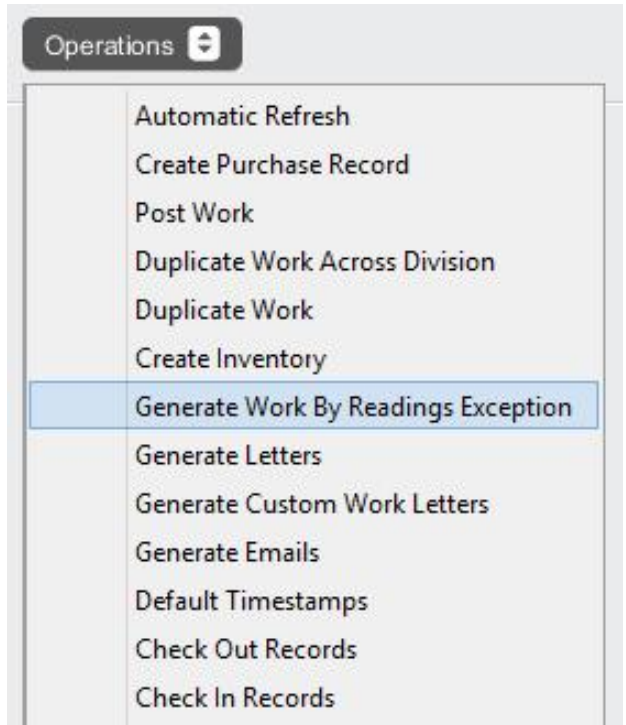
Readings Exceptions occur when information entered into readings on work orders falls outside the intervals or limits set for those readings. These are set up in the Readings capsule, located under the Work tab. Readings Exceptions can then be used to generate follow-up and corrective work orders to address issues discovered during inspections or routine maintenance.

To learn more about Readings and how they are set up, see the AwareManager Quick Reference document: **Readings**.

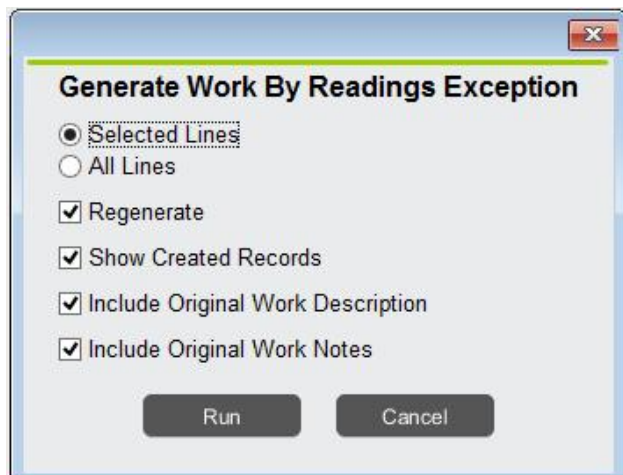
Manually Generate Work by Readings Exception

Readings Exceptions are generated from the Work List.

Note: When you generate work in this manner, a new work order will be generated for each individual exception. For example, if you have five readings on a single work order, and three of those readings have exceptions, three separate work orders will be created: one for each exception.



1. To begin, right click on the **Work** capsule and use **Open by Search** to open up the list of work for which you would like to generate readings exceptions. Or, if the work records you need are saved as a Recordset, open the Recordset.
2. Select the work records for which you would like to generate readings exceptions work orders. If you want to generate for all work orders in the list, you can skip this step.
3. Go to **Operations** and choose **Generate Work by Readings Exception**.
4. In the pop-up box, choose "Selected Lines" if you selected work records in the previous step, "All Lines" if you want to generate for all work orders in the list.



5. There are four check boxes; check off all boxes that apply:
 - o **Regenerate:** if this is not the first time you are generating exceptions-based work orders for this list.
 - o **Show Created Records:** if you want a list of the new records to populate after the operation is complete.
 - o **Include Original Work Description:** if you would like the text in the Description field of each original work order to be included on the corresponding new work order(s).
 - o **Include Original Work Notes:** if you would like the text in the Notes field of each original work order to be included on the corresponding new work order(s).

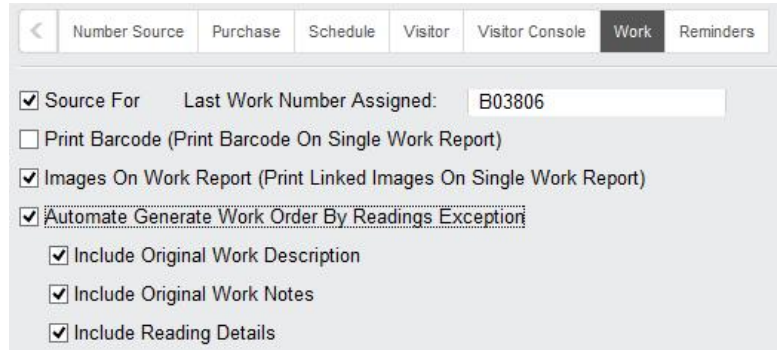
6. Click Run.

Automatically Generate Work by Readings Exception

You can alternatively set the system to automatically generate exception-based work on a division-by-division basis.

For each division in which you want automatic exception-based generation, select any of the following preferences under the **Work** tab:

- *Automate Generate Work Order By Readings Exception* – select this for the system to check for readings exceptions every time a reading is saved.
- *Include Original Work Description* – if you would like the text in the Description field of each original work order to be included on the corresponding new work order(s).
- *Include Original Work Notes* - if you would like the text in the Notes field of each original work order to be included on the corresponding new work order(s).
- *Include Reading Details* – Displays the details of the reading which generated the exception (Code, Title, Value, Date, Time, Notes) in the *Notes* field of the new record generated



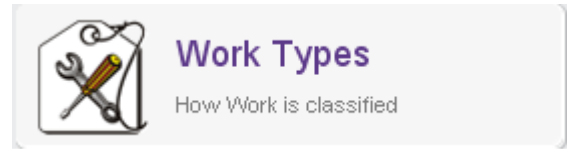
The screenshot shows a software interface with a navigation bar at the top containing tabs: < Number Source, Purchase, Schedule, Visitor, Visitor Console, Work, and Reminders. The 'Work' tab is selected. Below the tabs, there are several settings:

- Source For: Last Work Number Assigned: B03806
- Print Barcode (Print Barcode On Single Work Report)
- Images On Work Report (Print Linked Images On Single Work Report)
- Automate Generate Work Order By Readings Exception
- Include Original Work Description
- Include Original Work Notes
- Include Reading Details













Each time a Work Reading is saved, the system will check whether the value falls outside of the acceptable range defined for the reading, and if so, generate a new Work record from the corresponding Maintenance defined for ranges falling outside that limit. This occurs for Work whose readings are updated from the desktop as well as those updated via AwareManager Mobile.

Note: If you want to regenerate Work based on readings exceptions, you must use the manual operation detailed above.

Go to the **Work Type** capsule, located on the Work tab.



Create two Work Type records, one for HVAC-COLD and one for HVAC-HOT with the following (or similar) Readings:
Stat Temp, Stat Set Point, Stat Output, Dry Bulb, Relative Humidity.

Work Type            

Code: Inactive

Description:

Department: Maintenance/Janitorial

Worker:

Priority: Immediate Priority - wit...

Work Status: Open

Paragraph:

Work Category: HVAC Issues (global)

Estimated Hours:

Hourly Charge:

Hourly Cost:

Billable

Blank Lines (Print blank lines to record additional information)

Show In Cockpit

Show Authorization: Never
 Always
 Billable

Applies To: Time And Work
 Time Only
 Work Only




Custom Fields | Accounts | Defaults | Materials | **Readings** | Tasks | Restrictions | Timestamps | External | Portal Fields | Reminders

Reading	Title	Capsule	Code	Data Type	Notes
DRY BULB	Dry Bulb	Property		Number ODP	
HUMIDITY	Humidity	Property		Number ODP	
T-STAT SET POINT	Set Point	Property		Number ODP	
T-STAT TEMP	Stat Temp	Property		Number ODP	

Recording the Reading values on Work

1. When Work orders are entered for Hot and Cold Calls the appropriate readings will automatically appear on the Readings tab of that Work record.
2. Record the appropriate values for each hot and cold call.

Hint: If using AwareManager PDA or Mobile this can be completed via your preferred handheld device!

Work
  

Number: 12-100252 006AR

Tenant: AVON Avon Cosmetics

Work Contact: CARVER.J Joe Carver

Phone:

Property: 6 ARLNGTN 6 Arlington Street

Unit: 6 ARLNGTN-3L Third floor Ladies Room

Floor: 03

Room:

Department: MAINT Maintenance/Janitorial

Work Type: HVAC-COLD Too cold

Priority: 1-IMMED Immediate Priority - wit...

Worker:

Description: Too cold

Posted

Work Category: HVAC HVAC Issues (global)

Work Status: OPEN Open

Entered: February 21, 2013 13:38

Received:

Scheduled: February 21, 2013 13:38

Required: February 21, 2013 15:38

Started:

Completed:

Closed:

Posted:

Billable

Notes:

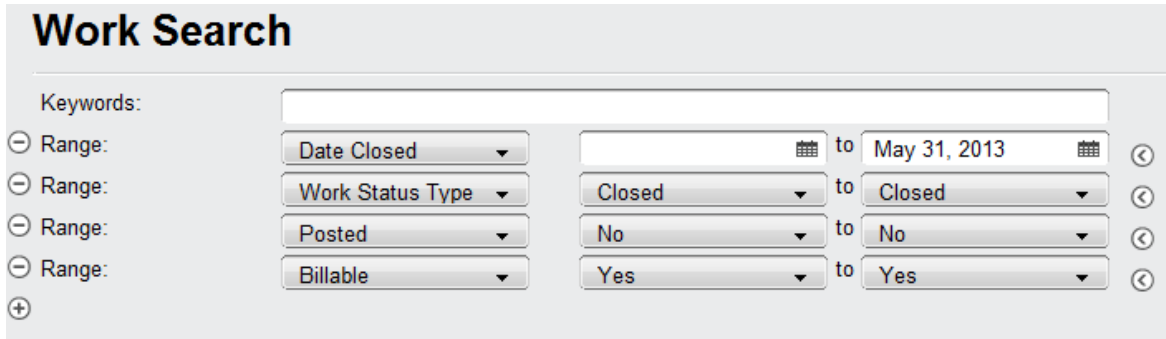
< Custom Fields Related Total Amounts Additional Amounts Time Materials Vendors **Readings** Tasks Other Links Mitigation Timestamps Files R >

Reading	Title	Capsule	Code	Data Type	Value	Date	Notes
DRY BULB	Dry Bulb	Property		Number ODP	0		
HUMIDITY	Humidity	Property		Number ODP	0		
T-STAT SET POINT	Set Point	Property		Number ODP	0		
T-STAT TEMP	Stat Temp	Property		Number ODP	0		

Remember: For the best reporting results, always remember to enter a date for the reading. A number of reports can be run to see Readings in addition to using the Work Readings Viewer.

This quick reference will show the simple steps to posting your Work Orders using the AwareManager

1. Fill out the completion details on each work order for Time, Materials, Vendor and Additional Amount charges.
2. Make sure that all of your Work Types are linked to the appropriate accounts.
3. Change the Status of the Work Order to Closed when you are ready to bill the work order.
4. Using the Work List, view all Closed, Non Posted, Billable Work Orders .



- Enter in the “to” date field under **Date Closed** to show all un-posted work orders from the beginning of time until that date.
- **Work Status Type** of Closed to Closed will only show WO’s with a closed status type.
- **Billable** Yes to Yes will show only Billable Work Orders.

5. Once the search range opens, view Work Orders in the Work List and correct any outstanding issues.

Check that each work order has the appropriate:

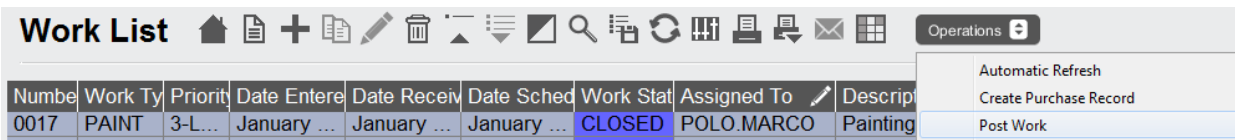
- Tenant
- Work Type
- Bill Code

Check that each work order has an amount (you can do this very quickly by highlighting the first line in the list and then using your keyboard arrows scroll down the list viewing the **Total Charge** amount to make certain it has a value that is reasonable).

- If a work order has the wrong amount – correct it.
- If a work order has a zero amount and it shouldn't be billed – unclick the billable checkbox.
- If the work order has a zero amount (or incorrect amount) and it is billable; change the status to COMPLETED and remove the Closed date and time information. It can be included in the next posting after the charges are confirmed.

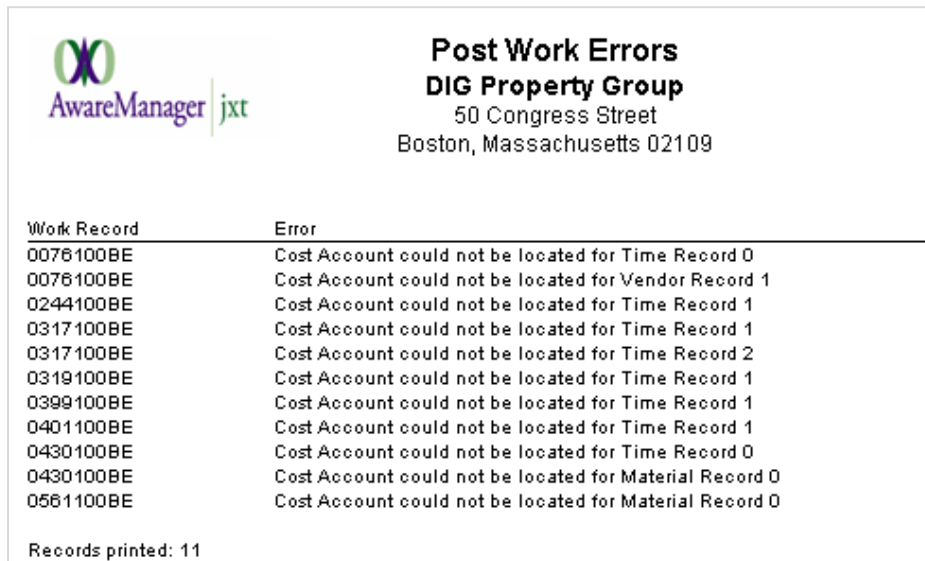
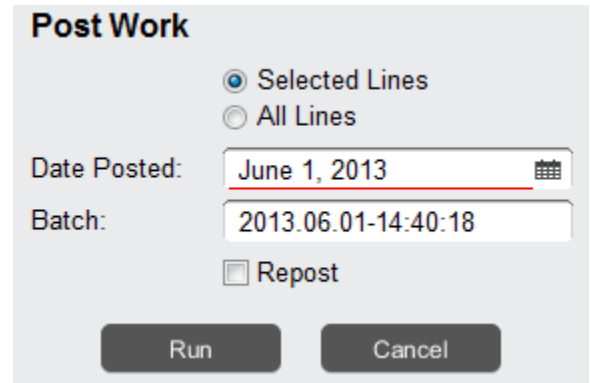
6. Once all the corrections are made you are ready to post.

7. Highlight all work orders to be posted and, using the operations button, select Post Work



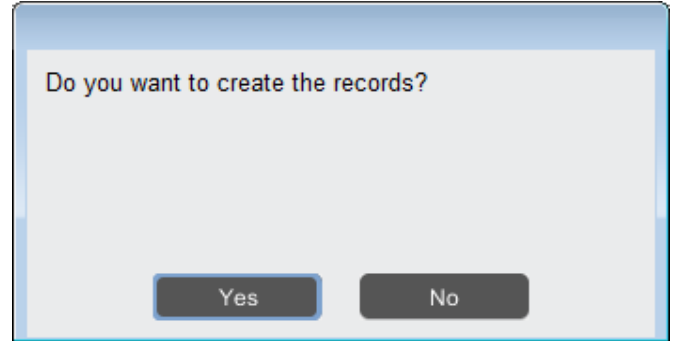
8. Date Posted will automatically put in today's date. Change this to the posting date you need. Leave the batch number as is. Then click the green check mark to post.

9. If you get a Post Work Errors log, print this using the printer icon on the top left of your screen and research and fix any errors. Then post again using the process above.

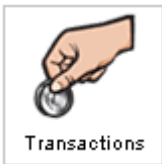


10. If you get the **Post Work Preview Report: Charges**, review your charges.
11. Once you close out of this report, you will be asked if you want to create the records (transactions).

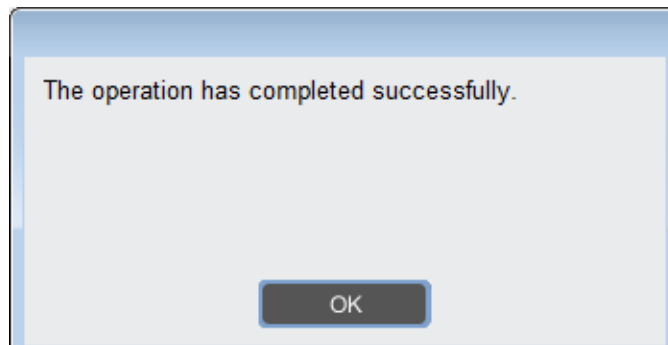
- **This is irreversible.**
- **If you do not wish to create the charges and need to edit the work orders, say NO.**
- **If you want to create the charges, say YES.**



12. Once you choose YES, the work orders will post and the transaction list will open.



13. Highlight all the transaction lines and choose the appropriate operation from the **Operations** menu.
14. You will be prompted to save the file.
15. Once saved you will receive the following message from AwareManager:

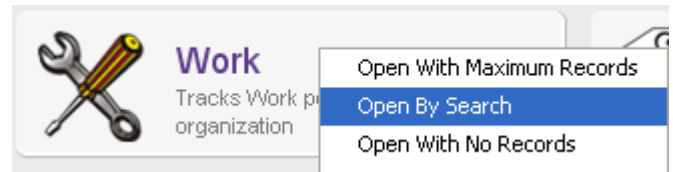
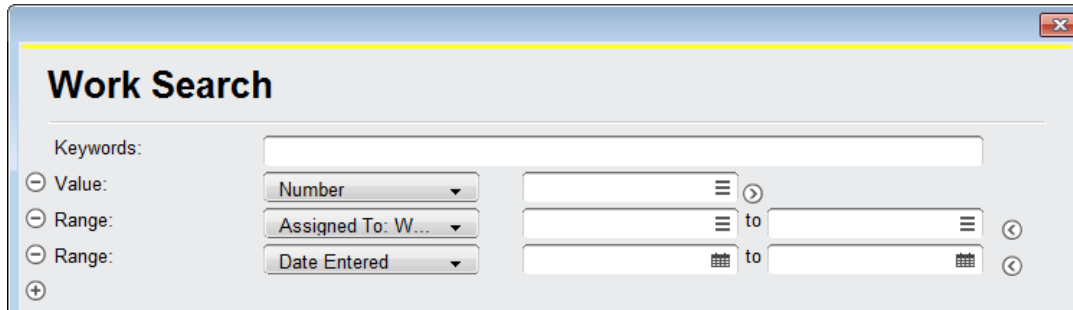


16. Upload the file into your appropriate accounting program.

Note: if the export file needs to be viewed, right click and say "Open With" then choose Notepad. This is the only way the formatting will not be compromised.

Right-click on **Work** and select **Open By Search**.

Enter search criteria to bring up the records you need to review/complete, *Typically Work Status Type **Open** to **Open***.

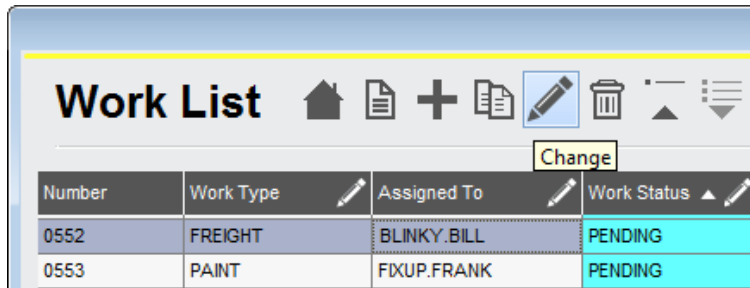



The 'Work Search' dialog box contains a 'Keywords:' text field and three filter sections. The first section has 'Value:' with a dropdown set to 'Number'. The second section has 'Range:' with a dropdown set to 'Assigned To: W...'. The third section has 'Range:' with a dropdown set to 'Date Entered'. Each section includes a search icon and a 'to' field with a calendar icon.

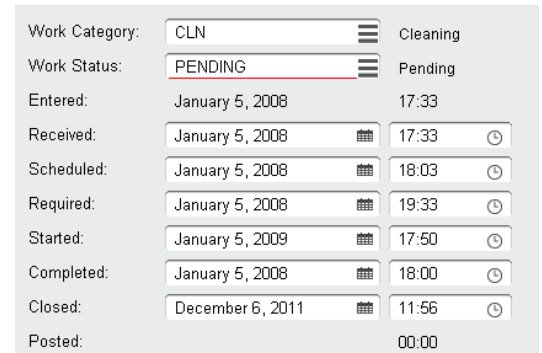
HINT: create a Recordset to make accessing your open work quick and easy. Refer to our Recordset Quick Reference.

Highlight the work record you want to adjust/complete and click **Change** from the Toolbar or double-click on the record and select the Change icon.

Enter information into the following fields (in the upper right-hand corner on the standard form):



Number	Work Type	Assigned To	Work Status
0552	FREIGHT	BLINKY.BILL	PENDING
0553	PAINT	FIXUP.FRANK	PENDING



The standard form fields include: Work Category: CLN (Cleaning); Work Status: PENDING (Pending); Entered: January 5, 2008 17:33; Received: January 5, 2008 17:33; Scheduled: January 5, 2008 18:03; Required: January 5, 2008 19:33; Started: January 5, 2009 17:50; Completed: January 5, 2008 18:00; Closed: December 6, 2011 11:56; Posted: 00:00.

• Work Status

- PENDING** The work is on hold (i.e. waiting for a part).
- COMPLETED** The work has been finished (but not all billable information has been recorded).
- CLOSED** The work is completed and all details are recorded if billable it is ready to be billed.

• Dates/Times

Entered, Received, Scheduled and Required typically will have defaulted during work entry. The following dates/times should default when the work order is changed to a Closed status type. You do not have to manually enter these unless there are no Time details for the work record.

- Started** When work began (based upon the earliest time record in the Time detail tab)
- Completed** When the work was finished (based upon the latest time record in the Time detail)
- Closed** This will default for you (to the current Date/Time) when you change the work status to CLOSED. Only change the work order to CLOSED if all of the details have been entered and (if billable) it is ready to bill your tenant.

Enter information into the following fields:

- **Description:** Review Description and edit if necessary.

The contents of the Description field typically appear on the AwareManager Portal pages.

- **Notes:** Record any details regarding the work in the Notes field. Typically this is used to record what action was taken to resolve the issue.

The contents of the Notes field may appear on the AwareManager Portal pages.

- **Work Details:** Enter details in the tabs at the bottom of the work record; Time, Materials and Vendors.
 - Charge rates will only default on work orders with the Billable checkbox checked.
 - Even if the work order is non-billable, enter the values to record cost details.
 - If the Charge field defaults you can clear the amounts for non-billable work orders.

Start Date	Contact	Work Type	Start Time	End Time	Time Type	Total Time	Description	Hourly Charge	Hourly Cost	Total Charge	Total Cost
January 5, ...	CARVER.J	CLEAN	17:50	18:00	REG	0.167	Cleanin...	40.0000	35.0000	\$6.68	
						0.000		0.0000	0.0000	\$0.00	

Material	Description	Purchase	Quantity	Unit Price	Charge	Unit Cost	Cost	Inventor
COPPER PIPE	Copper Pipe	00001	1.000	20.0000	\$20.00	15.8700	\$15.87	
MOTOROIL	Motor Oil		2.000	7.8000	\$15.60	7.8000	\$15.60	

Vendor	Description	Purchase	Charge	Cost
PLUMB TIME	Plumb Time		\$1,200.00	\$0.00

Save the changes by clicking on the Save icon when you are done.

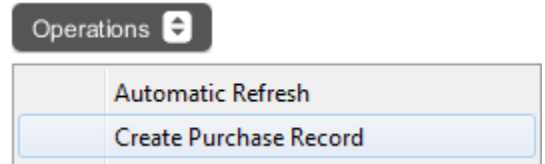
TIP: Enter the Invoice number for any Vendor Invoices into the Description field.











The **Create Purchase Record Operation** in the AwareManager allows you to create a new Purchase record from the Work list based upon a Work record.

When selected, the new Purchase record will automatically default information such as *Vendor, Client, Property, Unit, Department, Materials, Work Number, Contract, Project and Paragraph* from the highlighted Work record.

Access this Operation by clicking on the Operations button in the Work list. You can only have one Work record selected at a time.

Example Work Record:



Work          

Number: 3704 006AR Posted

Client: AVG America's Vacation Gr... Work Category: OTH Other

Work Contact: DALE.CLYDE S. Clyde S. Dale Work Status: SCHEDULED Work Assigned and Sc...

Phone:

Property: 6 ARLNGTN 6 Arlington Street Entered: April 27, 2010 18:50

Unit: 6 ARLNGTN-B Basement Received: November 15, 2012 15:21

Floor: floor Scheduled: November 15, 2012 15:21

Room: MECH Required: November 15, 2012 15:21

Department: ENG Engineering Started: 00:00

Work Type: CARPENTRY Carpentry Completed: 00:00

Priority: 1-IMMED Immediate Priority - wit... Closed: 00:00

Worker: ENG Engineer Posted: 00:00

Description: Weekly Generator Test - Summer Months Only Notes:

Billable

Purchases




Custom Fields Related Total Amounts Additional Amounts Time **Materials** Vendors Readings Tasks Other Links Mitigation Timestamps Files R >

Material	Description	Purchase	Quantity	Unit Price	Charge	Unit Cost	Cost	Inven
MOTOROIL	Motor Oil		3.000	7.8000	\$23.40	0.0000	\$0.00	
VENDING	Snack and Drink Machines		7.000	798.0000	\$5,586.00	0.0000	\$0.00	

Available Records: 6054

When this operation is selected, a new Purchase record will open (with defaulted information):

Purchase

Request Number: 08-0109	006AR	PO Number:
Purchase Type: BUILDING	Building Purchase	Total: \$0.00
Purchase Status: REQUEST	Request	Date Approved:
Vendor:		Time Approved:
Client: AVG	America's Vacation Gr...	Date Ordered:
Property: 6 ARLNGTN	6 Arlington Street	Time Ordered:
Unit: 6 ARLNGTN-B	Basement	Delivery:
Department: ENG	Engineering	Tracking Number:
Bill To:	6 Arlington Street Boston, MA 02115	Customer Number:
Deliver To:	6 Arlington Street Boston, MA 02115	Description:
		Notes:

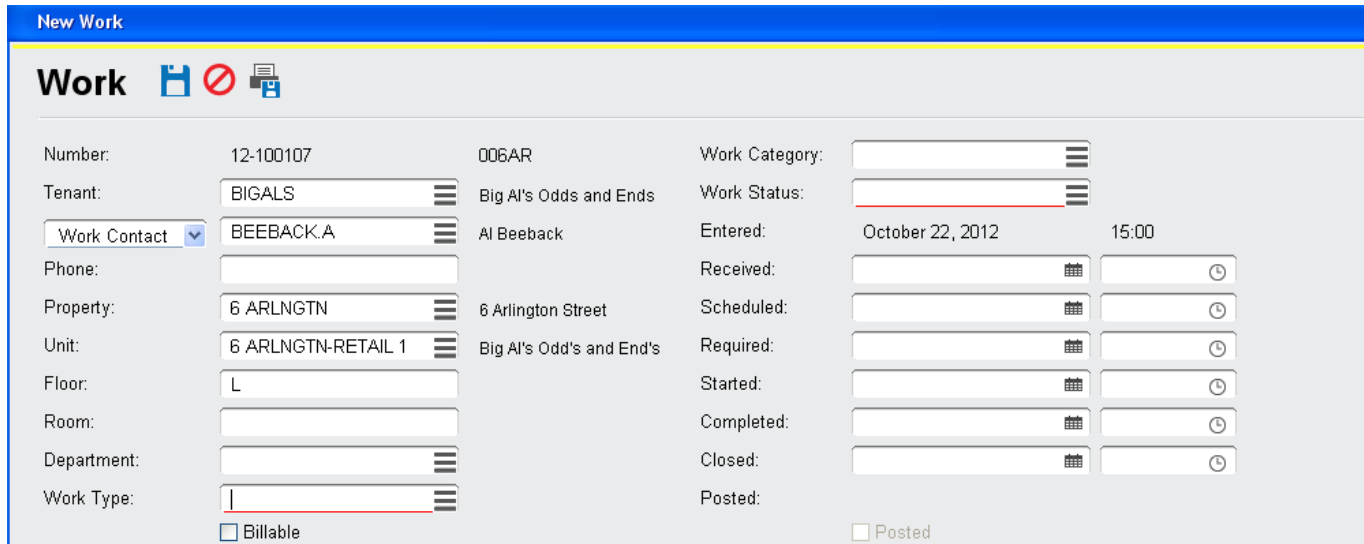
<
Custom Fields
Materials
Approval
Dates
Other Links
Reminders
>

Permission	Threshold	Approver	Date Approved	Time Approved	Purchase Status	Include On Report
FULLACCESS	1,000.000				APPROVAL3	<input checked="" type="checkbox"/>
PM	500.000				APPROVAL2	<input checked="" type="checkbox"/>
ENG	100.000				APPROVAL1	<input checked="" type="checkbox"/>
	0.000					<input type="checkbox"/>




Available Records: 0

When you have finished filling out the Purchase record, click the green checkmark and the record will be added to the Purchase capsule.

When entering information into AwareManager, some information will enter itself for you in a process called **defaulting**. The following is a detailed description of this process in terms of how it relates to adding work records.



New Work

Work   

Number: 12-100107 006AR Work Category:

Tenant: BIGALS Big Al's Odds and Ends Work Status:

Work Contact: BEEBACK.A Al Beeback Entered: October 22, 2012 15:00

Phone:

Property: 6 ARLNGTN 6 Arlington Street Received:

Unit: 6 ARLNGTN-RETAIL 1 Big Al's Odd's and End's Scheduled:

Floor: L Required:

Room:

Department:

Work Type:

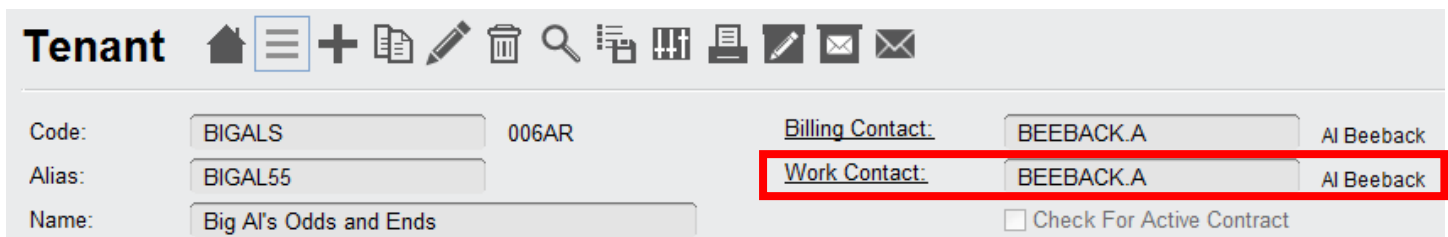
Billable Posted













When you first add a new Work record most of the fields are blank. After you enter the first piece of information (e.g. the Tenant code *BIGALS*) and press Tab, some fields default including the *Work Contact*, *Property*, *Unit* and *Floor*. You can change defaulted information at any time.

The Tenant code entered was *BIGALS* and all of the information about who called (*BEEBACK.A*) and where he is located (*6 ARLNGTN*) filled in automatically – this is called **DEFAULTING**.

1. AwareManager looks up the Tenant record that is entered.
2. If there is a value in the *Work Contact* field it defaults onto the work order.

This is how Al Beeback appeared on the work order without us having to enter his name.



Tenant            














Code: BIGALS 006AR Billing Contact: BEEBACK.A Al Beeback

Alias: BIGAL55 Work Contact: BEEBACK.A Al Beeback

Name: Big Al's Odds and Ends Check For Active Contract

Note: If the *Work Contact* field is blank on the Tenant record – it will default the combo box in the Work order to *Work Contact* and then prompt the user to select from a list of Contacts for the Tenant.

3. Then, it looks up the *Contact* record.
4. If there is a value in the *Phone*, *Property* and *Unit* fields it defaults them onto the Work order.

Contact             








Code:	<input type="text" value="BEEBACK.A"/> 006AR	Phone:	<input type="text"/>
Alias:	<input type="text"/>	Home Phone:	<input type="text"/>
Name:	<input type="text" value="Al Beeback"/>	Fax:	<input type="text"/>
Title:	<input type="text"/>	Cell Phone:	<input type="text"/>
Salutation:	<input type="text" value="Dear Al Beeback"/>	Address:	<input type="text" value="6 Arlington Street"/>
Email:	<input type="text"/>	City:	<input type="text" value="Boston"/>
<u>Tenant:</u>	<input type="text"/>	State:	<input type="text" value="MA"/>
<u>Property:</u>	<input type="text" value="6 ARLNGTN"/> 6 Arlington Street	Zip Code:	<input type="text" value="02115"/>
<u>Unit:</u>	<input type="text" value="6 ARLNGTN-RETAIL 1"/> Big Al's Odd's and End's	Country:	<input type="text"/>
Floor:	<input type="text"/>		
Room:	<input type="text"/>		

This is where Al's *Name* is stored, and where the *Property* and *Unit* came from that appeared on the Work order.

Notes:

- If the telephone number is blank on the Contact record – it will default the telephone number from the Client record.
 - If the Property and/or Unit fields are blank on the Contact record – nothing will default onto the Work order (unless the Client is linked to a single Unit record)
5. AwareManager then looks at the *Unit* record. If there is a value in the *Floor*, *Room*, and *Description* fields – it defaults them onto the Work order.

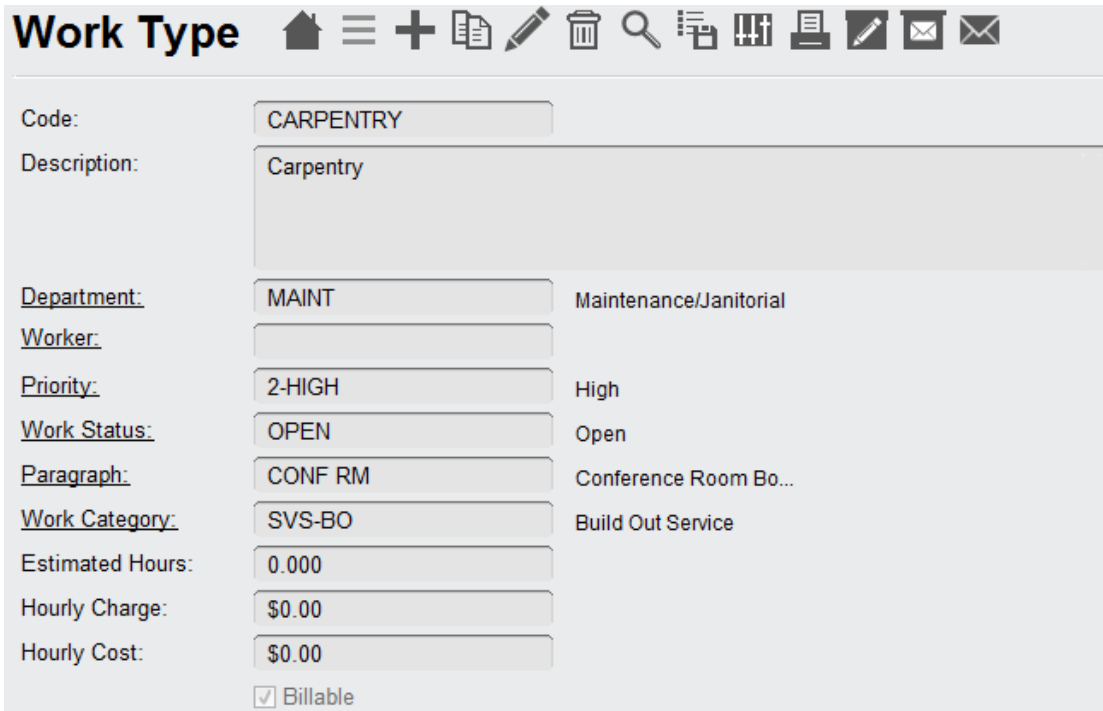
This is how Floor L and Big Al's Odd's and End's appeared on the work order.

Unit       

Code:	<input type="text" value="6 ARLNGTN-RETAIL 1"/>
<u>Property:</u>	<input type="text" value="6 ARLNGTN"/>
Number:	<input type="text" value="RETAIL 1"/>
Floor:	<input type="text" value="L"/>
Room:	<input type="text"/>
<u>Contact:</u>	<input type="text" value="BEEBACK.A"/>
Square Footage:	<input type="text" value="0"/>
Description:	<input type="text" value="Big Al's Odd's and End's"/>

Now let's review the **defaulting** behavior for the rest of the Work Entry screen.

6. A *Work Type* code is entered and AwareManager looks up that work type record.
7. If there are values in the *Department, Worker, Billable and Priority* fields, it defaults them onto the work order.



Work Type

Code: CARPENTRY

Description: Carpentry

Department: MAINT Maintenance/Janitorial

Worker:

Priority: 2-HIGH High

Work Status: OPEN Open

Paragraph: CONF RM Conference Room Bo...

Work Category: SVS-BO Build Out Service

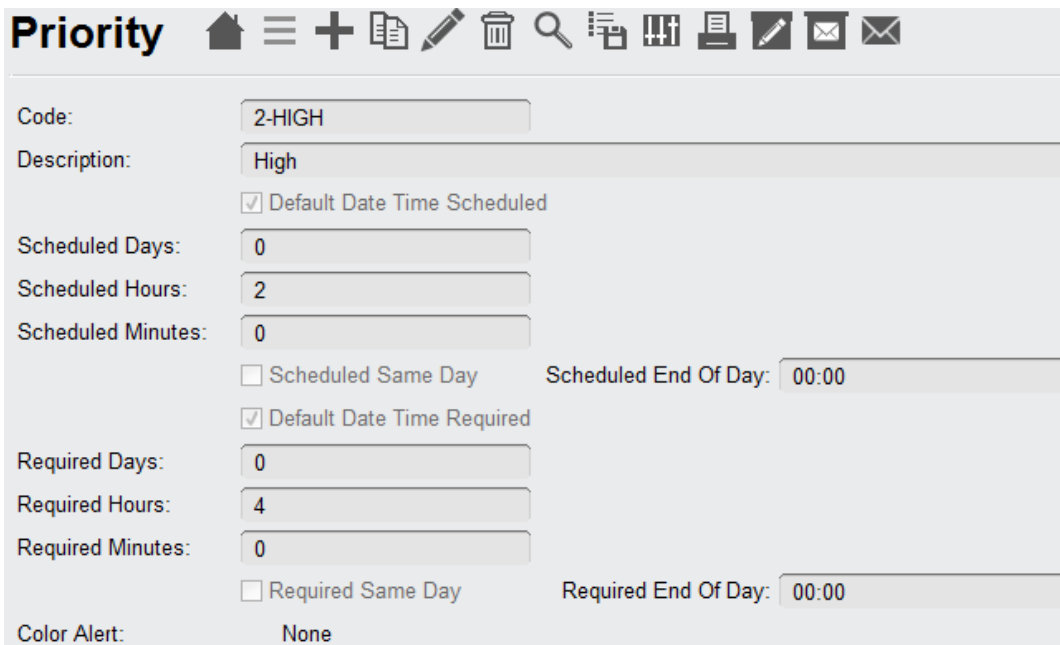
Estimated Hours: 0.000

Hourly Charge: \$0.00

Hourly Cost: \$0.00

Billable

8. Then, AwareManager looks at the information in the *Priority* record. It looks at the definition of the priority in order to determine the *Scheduled Date and Time* and the *Required Date and Time*.



Priority

Code: 2-HIGH

Description: High

Default Date Time Scheduled

Scheduled Days: 0

Scheduled Hours: 2

Scheduled Minutes: 0

Scheduled Same Day Scheduled End Of Day: 00:00

Default Date Time Required

Required Days: 0

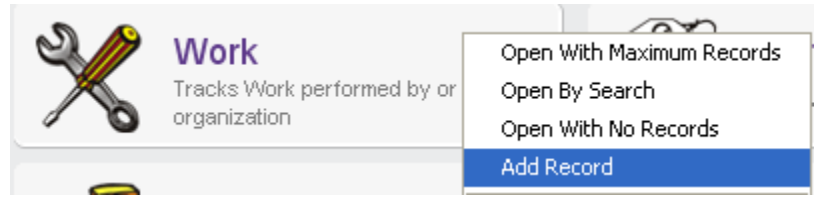
Required Hours: 4

Required Minutes: 0

Required Same Day Required End Of Day: 00:00

Color Alert: None

1. Right-click on **Work** and select **Add Record**, or **Open By Search** and click **New** from the list/form.



2. Enter information into the following fields:



The top of the Work window records WHO and WHERE:

Number:	0061	006AR
Tenant:	ONEWAY	The One Way Company
Work Contact:	REVER.P	Paul Rever
Phone:	617-767-3427	
Property:	6 ARLNGTN	6 Arlington Street
Unit:	6 ARLNGTN-300	Suite 300
Floor:		
Room:		

Client or Tenant	To bring up the list of Clients/Tenants, enter the first few characters of the name and press Tab. Select from the list by double-clicking or highlight and press Tab. Note: In most cases the following fields will default once you Tab out of the Client/Tenant field: Contact, Phone, Property, Unit, Floor and Room.
Work Contact	If the wrong contact defaulted, update the field accordingly. To bring up the list of Contacts, enter the first few characters of their last name and press Tab. Select from the list by double-clicking the record or highlighting the record and pressing Tab. If the person is not in the Contact list - change the field title from <u>Work Contact</u> to Work Person by clicking on the <u>down arrow</u> . Then type the person's name in the field. <div style="text-align: center;"> <input type="text" value="Work Person"/> <input type="text" value="Type the person's name"/> </div>
Phone	This should default; if it is incorrect or blank adjust it accordingly. Enter the number of the person reporting the work or the number where work is to take place.

Unit	This should default based upon the client/tenant; if it is incorrect or blank adjust it accordingly. Note: If the Unit is not in the list, select the record for the floor and use the Room field to record the Unit.
Floor	The Floor field will default based upon the Unit.
Room	The Room field can be used to further describe the location (kitchen, conf room, etc). All these values should reflect where the work will be performed.

Reminders:
 Use the Tab key to move from one field to the next - Use Shift / Tab to move backwards through the fields.
 Selecting Enter will save the record (or you can click the green checkmark).
 Fields outlined in red are mandatory.

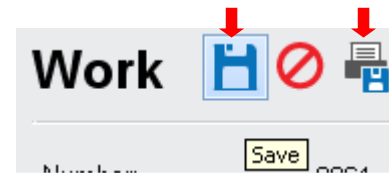
3. Enter information into the following fields:

The second part of the Work window records **WHAT, WHO (the work will be assigned to), and WHEN.**

Work Type	Select the code for the type of work needed to resolve the issue. Note: If you are not sure of the code, type the first few characters and press Tab.
Assigned To: Worker	Most of your work orders will be assigned to Workers (staff). If the work is assigned to a vendor change the field title to Vendor and choose the appropriate vendor from the list.
Priority	This will default based upon the Work Type, you can adjust if necessary.
Description	Enter the specific information regarding the work. Note: this information will typically be shown to the clients on the Portal Pages.
Notes	Typically this field is left blank; as it is used at completion to record details related to the work that was performed.
Work Category	This will default based upon the Work Type, you can adjust if necessary.
Work Status	This will default based upon the Work Type, you can adjust if necessary.

Number:	0061	006AR	<input type="checkbox"/> Posted
Tenant:	ONEWAY	The One Way Company	Work Category: CLN Cleaning
Work Contact:	REVER.P	Paul Rever	Work Status: CLOSED Work is done, inspect
Phone:	617-767-3427		Entered: January 9, 2008 15:38
Property:	6 ARLNGTN	6 Arlington Street	Received: January 9, 2008 15:38
Unit:	6 ARLNGTN-300	Suite 300	Scheduled: January 10, 2008 15:38
Floor:			Required: January 11, 2008 15:35
Room:			Started: January 11, 2008 10:20
Department:	CLN		Completed: December 3, 2011 12:05
Work Type:	CLEAN	Cleaning	Closed: December 6, 2011 16:00
Priority:	3-LOW	Low	Posted: 00:00
Worker:	ENG1	Eng 1	<input type="checkbox"/> Billable
Description:	need the carpets to be steam cleaned		Notes:

Save the changes by clicking on the **Save** icon when you are done.
To **Save and Print** click the **Save and Print** icon.



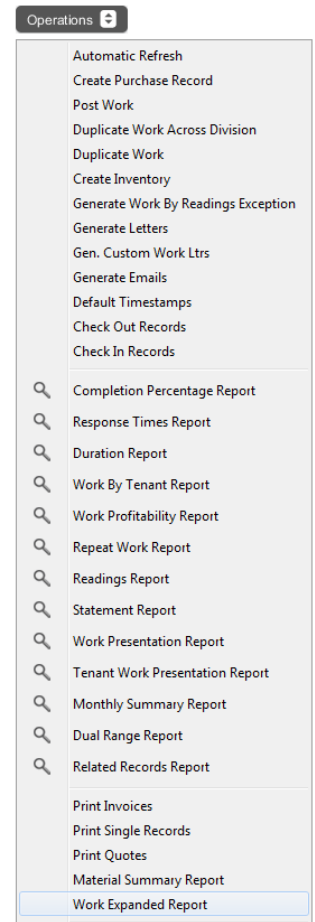
The Expanded Reports in AwareManager are based on the records and columns currently displayed in your list.

Access this report from the **Operations** menu in the following capsules and select **Expanded Report**:

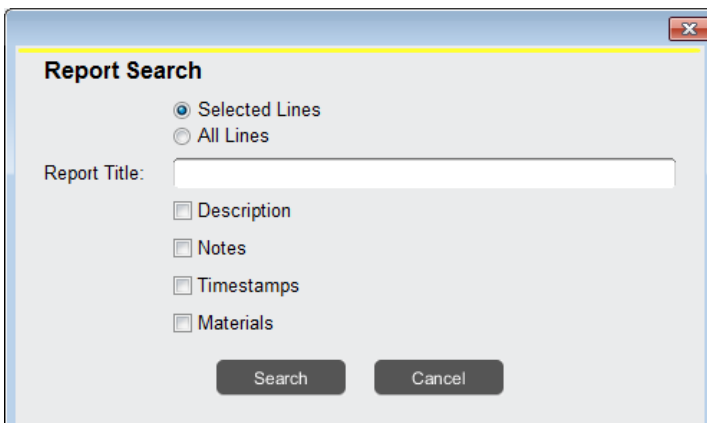
- Work
- Maintenance
- Insurance
- Inventory
- Reminders

Based on the Capsule you are in, the Expanded Report gives you a few various search options:

- Choose to print either “Selected Lines” or “All Lines” in the list.
- In some capsules you may enter a customized title for your report.



Based on the information in each capsule, you are given checkboxes to add additional fields to your report, even if they do not appear in your list:



- Work (Description and Notes)
- Maintenance (Description, Notes, Task, and Materials)
- Insurance (Notes and Coverages)
- Inventory (Paragraph and Description)
- Reminders (Notes)

These reports sort based on the sort in your list.

Example of the Work Expanded Report:

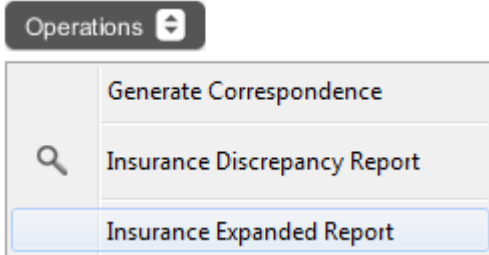
Division	Number	Work Status	Time Entered	Time Received	Date Entered	Work Type	Client
010ST	0019	OPEN	19:04	19:04	January 7, 2008	HVAC-HOT	CLOUSEAUS
	Description:	Too hot					
010ST	0023	OPEN	19:06	19:06	January 7, 2008	HVAC-HOT	JOHNSONBR...
	Description:	Too hot; The office is very hot.					
010ST	0034	OPEN	09:54	09:54	January 9, 2008	FREIGHT	JOHNSONBR...
	Description:	We will need to reserve the use of the Freight Elevator for this Thursday - due to some new furniture being delivered					
010ST	0064	OPEN	15:43	15:43	January 9, 2008	ELEC	PARKSPAGO...
	Description:	there will need to be some ice remover used on the side walk- and snow shoveled in the back lot					
010ST	0071	OPEN	11:45	11:45	January 14, 2008	FREIGHT	JOHNSONBR...
	Description:	we will need to reserve use of the freight elevator for a half hour today at 1330-1400					
010ST	12-100022	OPEN	12:34	12:34	September 21, ...	BOOKING	JOHNSONBR...
	Description:	New work record - how does it print?					
	Materials:	Code	Description	Quantity			
		TELEVISION	Television	0.000			
		SCREEN	Screen	0.000			
		MONITOR	Monitor	0.000			
010ST	12-100023	OPEN	12:38	12:34	September 21, ...	BOOKING	JOHNSONBR...
	Description:	New work record 2 - how does it print?					
010ST	12-100037	OPEN	18:30	15:43	October 4, 2012	ELEC	JOHNSONBR...
	Description:	there will need to be some ice remover used on the side walk- and snow shoveled in the back lot					
010ST	12-100038	OPEN	18:30	11:45	October 4, 2012	FREIGHT	PARKSPAGO...
	Description:	we will need to reserve use of the freight elevator for a half hour today at 1330-1400					
	Materials:	Code	Description	Quantity			
		BALLAST R-1600	Ballasr R-1600	2.000			
		LUMBER-2X4	Lumber - 2x4 (priced per foot)	2.000			

Printed Thu Nov 8 15:41:40 EST 2012

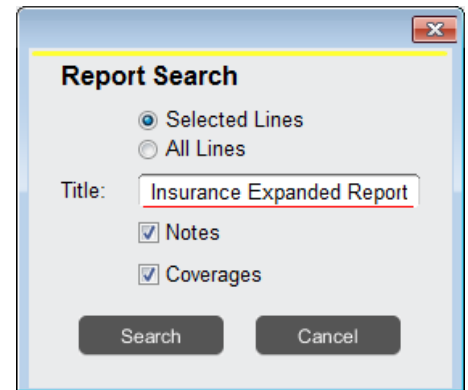
Page 1 of 3

Insurance Expanded Report


Access this report through the Operations menu in the Insurance Capsule.



Use the Report Search window to define the data you want shown on your report. Choose from Selected lines or All Lines, create a custom Title, and choose whether or not you want Notes and Coverages displayed on the report.



Example of an Insurance Expanded Report:

 Insurance Expanded Report DIG Property Group 50 Congress Street Boston, Massachusetts 02109									
Number	Division	Property	Insured Party	Contact	Phone	Insurer	Date Issued		
Coverage	Policy		In Force From	In Force To	Occurrence	Limit Amount	Required Amount		
0004	100BE	100 BEACON	The Bug Be Gone Co...	HOLMES.BUGSY	1-800-BUG-GONE	UMBRELLA		January 1, 2012	
Notes: Testing notes									
GL		1234-45	January 1, 2008	December 31, 2012	each	1,000,000.00	1,000,000.00		
WC		5556-89899	December 1, 2007	December 1, 2012	each	800,000.00	750,000.00		
0005	100BE	100 BEACON	ABC Lighting Compa...	BRITE.JACK		INSUREDPRO		January 1, 2008	
Notes: asdf									
WC		1234-45	January 1, 2008	December 31, 2012	each	100,000.00	75,000.00		
GL		5556-89899	December 1, 2007	November 30, 2012	each	1,000,000.00	1,000,000.00		
AUTO		54321	July 1, 2007	June 30, 2012	each	250,000.00	500,000.00		
0008	100BE	100 BEACON	Paint Me Happy (PAI...	ROLLER.FRANK		INSUREDPRO		February 1, 2008	
GL		GL-99089777	March 1, 2008	March 1, 2013	each	2,000,000.00	1,500,000.00		
WC		WC-00987-112	February 1, 2008	February 28, 2013	each	1,000,000.00	750,000.00		
0018	100BE	100 BEACON	Build It Up Constructi...	DIGGER.DAN	1-800-BUI-LDIT	ATLANTIC		August 1, 2009	
GL		44556688989	August 1, 2009	August 1, 2012	1000000	10,000,000.00	50,000,000.00		

Records printed: 4

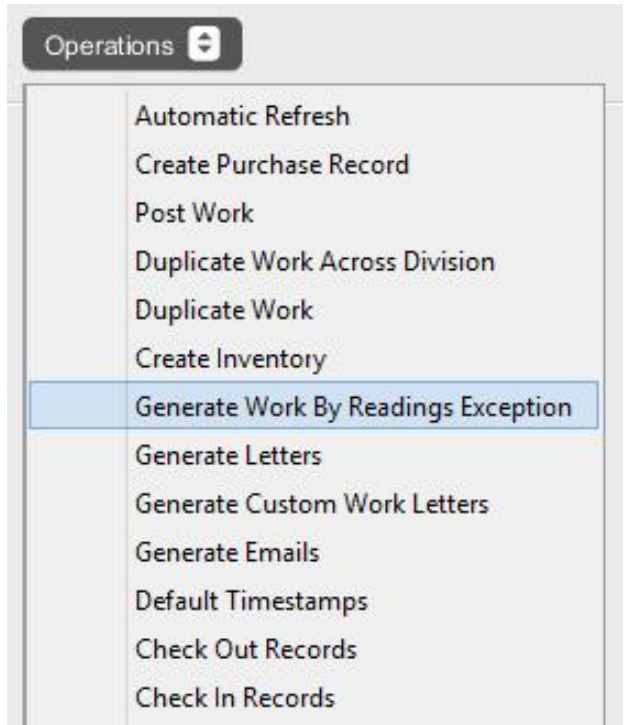
Readings Exceptions occur when information entered into readings on work orders falls outside the intervals or limits set for those readings. These are set up in the Readings capsule, located under the Work tab. Readings Exceptions can then be used to generate follow-up and corrective work orders to address issues discovered during inspections or routine maintenance.

To learn more about Readings and how they are set up, see the AwareManager Quick Reference document: **Readings**.

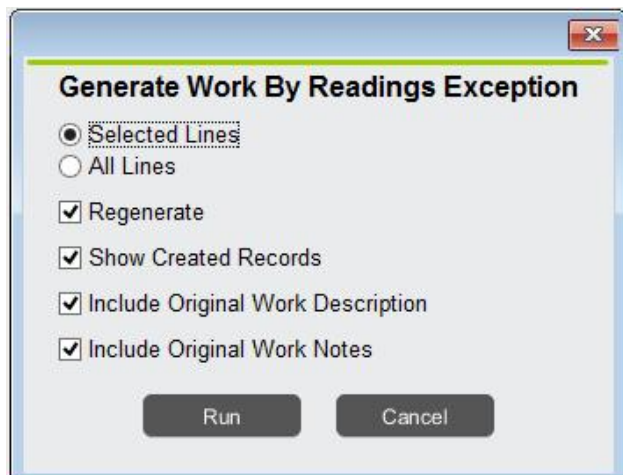
Manually Generate Work by Readings Exception

Readings Exceptions are generated from the Work List.

Note: When you generate work in this manner, a new work order will be generated for each individual exception. For example, if you have five readings on a single work order, and three of those readings have exceptions, three separate work orders will be created: one for each exception.



1. To begin, right click on the **Work** capsule and use **Open by Search** to open up the list of work for which you would like to generate readings exceptions. Or, if the work records you need are saved as a Recordset, open the Recordset.
2. Select the work records for which you would like to generate readings exceptions work orders. If you want to generate for all work orders in the list, you can skip this step.
3. Go to **Operations** and choose **Generate Work by Readings Exception**.
4. In the pop-up box, choose "Selected Lines" if you selected work records in the previous step, "All Lines" if you want to generate for all work orders in the list.



5. There are four check boxes; check off all boxes that apply:
 - o **Regenerate:** if this is not the first time you are generating exceptions-based work orders for this list.
 - o **Show Created Records:** if you want a list of the new records to populate after the operation is complete.
 - o **Include Original Work Description:** if you would like the text in the Description field of each original work order to be included on the corresponding new work order(s).
 - o **Include Original Work Notes:** if you would like the text in the Notes field of each original work order to be included on the corresponding new work order(s).

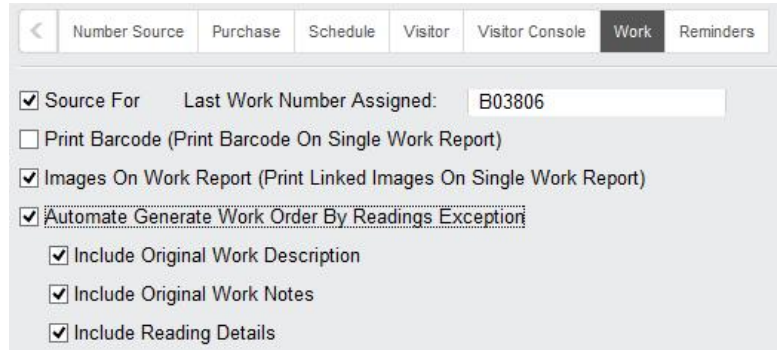
6. Click Run.

Automatically Generate Work by Readings Exception

You can alternatively set the system to automatically generate exception-based work on a division-by-division basis.

For each division in which you want automatic exception-based generation, select any of the following preferences under the **Work** tab:

- *Automate Generate Work Order By Readings Exception* – select this for the system to check for readings exceptions every time a reading is saved.
- *Include Original Work Description* – if you would like the text in the Description field of each original work order to be included on the corresponding new work order(s).
- *Include Original Work Notes* - if you would like the text in the Notes field of each original work order to be included on the corresponding new work order(s).
- *Include Reading Details* – Displays the details of the reading which generated the exception (Code, Title, Value, Date, Time, Notes) in the *Notes* field of the new record generated



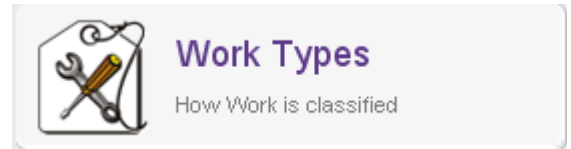
The screenshot shows a software interface with a navigation bar at the top containing tabs: < Number Source, Purchase, Schedule, Visitor, Visitor Console, Work, and Reminders. The 'Work' tab is selected. Below the tabs, there are several settings:

- Source For Last Work Number Assigned: B03806
- Print Barcode (Print Barcode On Single Work Report)
- Images On Work Report (Print Linked Images On Single Work Report)
- Automate Generate Work Order By Readings Exception
- Include Original Work Description
- Include Original Work Notes
- Include Reading Details

Each time a Work Reading is saved, the system will check whether the value falls outside of the acceptable range defined for the reading, and if so, generate a new Work record from the corresponding Maintenance defined for ranges falling outside that limit. This occurs for Work whose readings are updated from the desktop as well as those updated via AwareManager Mobile.

Note: If you want to regenerate Work based on readings exceptions, you must use the manual operation detailed above.

Go to the **Work Type** capsule, located on the Work tab.



Create two Work Type records, one for HVAC-COLD and one for HVAC-HOT with the following (or similar) Readings:
Stat Temp, Stat Set Point, Stat Output, Dry Bulb, Relative Humidity.

Work Type 🏠 ☰ + 📄 ✎ 🗑️ 🔍 📅 📊 📄 ✎ 📧 ✉️

Code: Inactive

Description:

Department: Maintenance/Janitorial

Worker:

Priority: Immediate Priority - wit...

Work Status: Open

Paragraph:

Work Category: HVAC Issues (global)

Estimated Hours:

Hourly Charge:

Hourly Cost:

Billable

Blank Lines (Print blank lines to record additional information)

Show In Cockpit

Show Authorization: Never
 Always
 Billable

Applies To: Time And Work
 Time Only
 Work Only




<
Custom Fields
Accounts
Defaults
Materials
Readings
Tasks
Restrictions
Timestamps
External
Portal Fields
Reminders

Reading	Title	Capsule	Code	Data Type	Notes
DRY BULB	Dry Bulb	Property		Number ODP	
HUMIDITY	Humidity	Property		Number ODP	
T-STAT SET POINT	Set Point	Property		Number ODP	
T-STAT TEMP	Stat Temp	Property		Number ODP	

Recording the Reading values on Work

1. When Work orders are entered for Hot and Cold Calls the appropriate readings will automatically appear on the Readings tab of that Work record.
2. Record the appropriate values for each hot and cold call.

Hint: If using AwareManager PDA or Mobile this can be completed via your preferred handheld device!

Work
  

Number: 12-100252 006AR

Tenant: AVON Avon Cosmetics

Work Contact CARVER.J Joe Carver

Phone:

Property: 6 ARLNGTN 6 Arlington Street

Unit: 6 ARLNGTN-3L Third floor Ladies Room

Floor: 03

Room:

Department: MAINT Maintenance/Janitorial

Work Type: HVAC-COLD Too cold

Priority: 1-IMMED Immediate Priority - wit...

Worker

Description: Too cold

Posted

Work Category: HVAC HVAC Issues (global)

Work Status: OPEN Open

Entered: February 21, 2013 13:38

Received:

Scheduled: February 21, 2013 13:38

Required: February 21, 2013 15:38

Started:

Completed:

Closed:

Posted:

Billable

Notes:

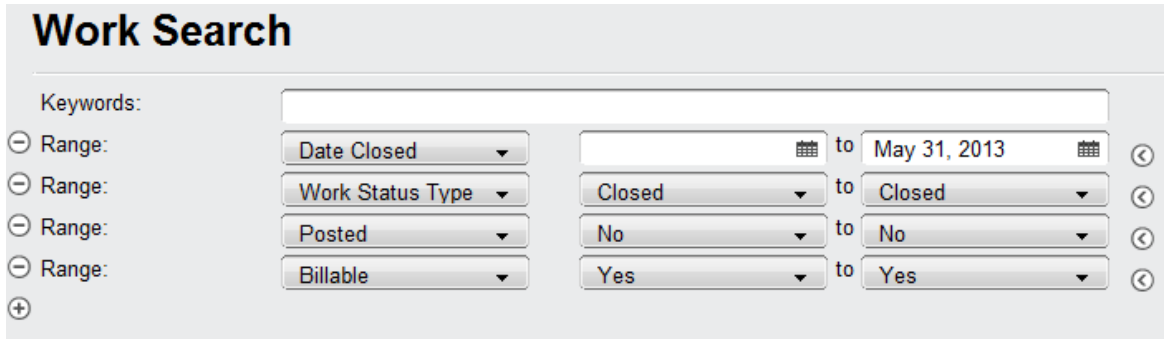
< Custom Fields Related Total Amounts Additional Amounts Time Materials Vendors **Readings** Tasks Other Links Mitigation Timestamps Files R >

Reading	Title	Capsule	Code	Data Type	Value	Date	Notes
DRY BULB	Dry Bulb	Property		Number ODP	0		
HUMIDITY	Humidity	Property		Number ODP	0		
T-STAT SET POINT	Set Point	Property		Number ODP	0		
T-STAT TEMP	Stat Temp	Property		Number ODP	0		

Remember: For the best reporting results, always remember to enter a date for the reading. A number of reports can be run to see Readings in addition to using the Work Readings Viewer.

This quick reference will show the simple steps to posting your Work Orders using the AwareManager

1. Fill out the completion details on each work order for Time, Materials, Vendor and Additional Amount charges.
2. Make sure that all of your Work Types are linked to the appropriate accounts.
3. Change the Status of the Work Order to Closed when you are ready to bill the work order.
4. Using the Work List, view all Closed, Non Posted, Billable Work Orders .



- Enter in the “to” date field under **Date Closed** to show all un-posted work orders from the beginning of time until that date.
- **Work Status Type** of Closed to Closed will only show WO’s with a closed status type.
- **Billable** Yes to Yes will show only Billable Work Orders.

5. Once the search range opens, view Work Orders in the Work List and correct any outstanding issues.

Check that each work order has the appropriate:

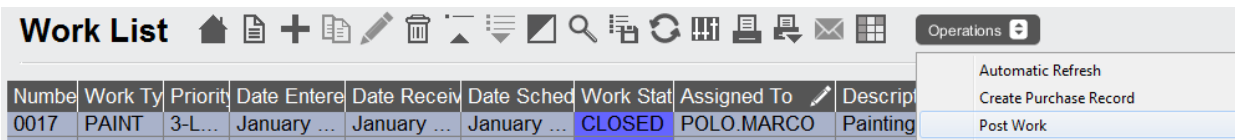
- Tenant
- Work Type
- Bill Code

Check that each work order has an amount (you can do this very quickly by highlighting the first line in the list and then using your keyboard arrows scroll down the list viewing the **Total Charge** amount to make certain it has a value that is reasonable).

- If a work order has the wrong amount – correct it.
- If a work order has a zero amount and it shouldn't be billed – unclick the billable checkbox.
- If the work order has a zero amount (or incorrect amount) and it is billable; change the status to COMPLETED and remove the Closed date and time information. It can be included in the next posting after the charges are confirmed.

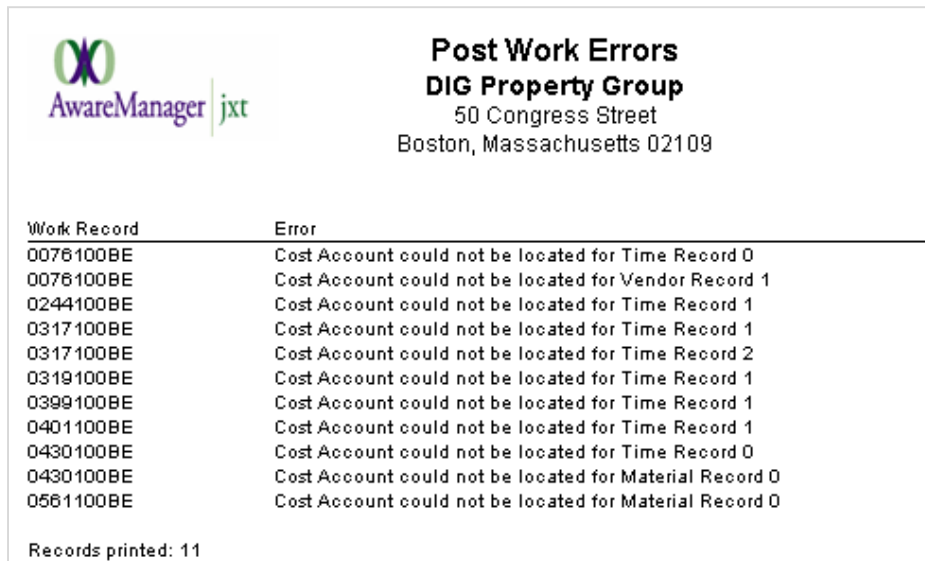
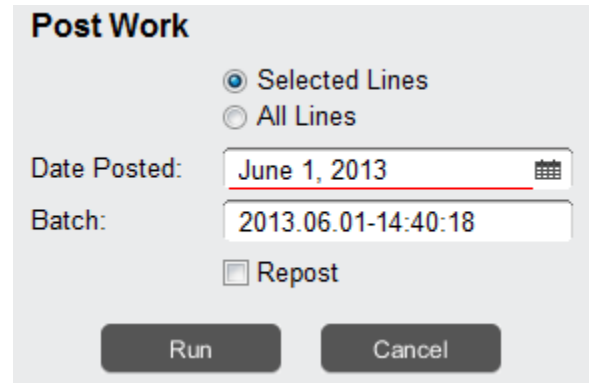
6. Once all the corrections are made you are ready to post.

7. Highlight all work orders to be posted and, using the operations button, select Post Work



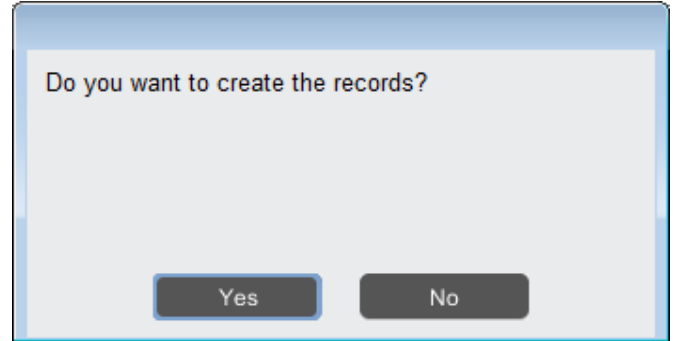
8. Date Posted will automatically put in today's date. Change this to the posting date you need. Leave the batch number as is. Then click the green check mark to post.

9. If you get a Post Work Errors log, print this using the printer icon on the top left of your screen and research and fix any errors. Then post again using the process above.

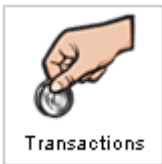


10. If you get the **Post Work Preview Report: Charges**, review your charges.
11. Once you close out of this report, you will be asked if you want to create the records (transactions).

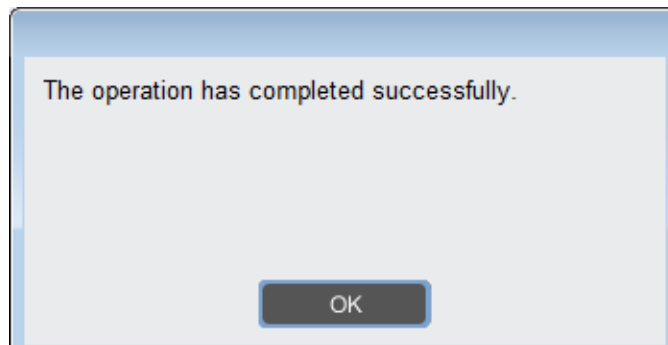
- **This is irreversible.**
- **If you do not wish to create the charges and need to edit the work orders, say NO.**
- **If you want to create the charges, say YES.**



12. Once you choose YES, the work orders will post and the transaction list will open.



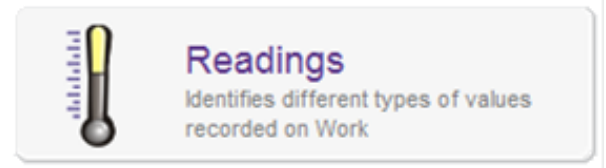
13. Highlight all the transaction lines and choose the appropriate operation from the **Operations** menu.
14. You will be prompted to save the file.
15. Once saved you will receive the following message from AwareManager:














16. Upload the file into your appropriate accounting program.

Note: if the export file needs to be viewed, right click and say "Open With" then choose Notepad. This is the only way the formatting will not be compromised.

The Readings capsule is used to identify the different types of values you will be recording on your work records. This capsule is used for both corrective work and work created via the **Maintenance** capsule.



You can create as many different Readings as you like in the system and they can be grouped together either based upon the **Work Type** or the **Task**. Readings can also be added individually to a Work record.

Reading           

Code: Inactive

Description:

Title:

Notes:

Data Type:

List Choices:

Exception: Include Upper Limit

Upper Limit:

Upper Maintenance:

Include Lower Limit

Lower Limit:

Lower Maintenance: Annual Air Handling U...

Typically **Tasks** are created for use with **Maintenance** work records (PMs) however you can also build tasks with Reading lists for use with corrective work orders.

A good example of this would be a reading that you will take when diagnosing a hot or cold call. You might record the thermostat set point, the reading on the thermostat, dry bulb and humidity readings. All of these readings could be set up to default based on the **Work Type**, or you could group the Readings on a **Task** record.

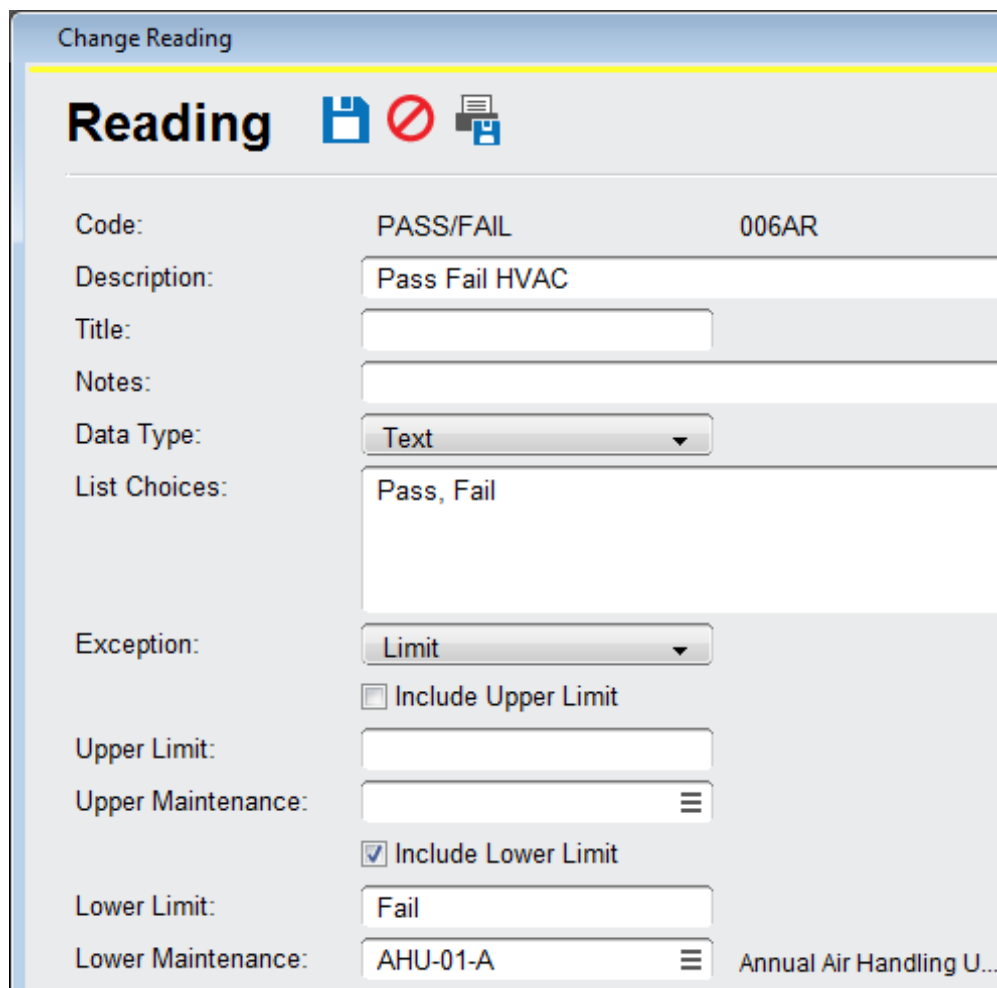
Reading	Title	Capsule	Code	Data Type	Value	Date	Notes
AMP	Amperage			Number ODP	0		Motor
T-STAT TE...	Stat Temp	Property		Number ODP	0		
T-STAT SE...	Set Point	Property		Number ODP	0		
DRY BULB	Dry Bulb	Property		Number ODP	0		record at arrival and dep...
AMP	Amperage	Equipment	AHU-01	Number ODP	0		
HUMIDITY	Humidity	Equipment	AHU-01	Number ODP	0		
DRY BULB	Dry Bulb	Equipment	AHU-01	Number ODP	0		record at arrival and dep...
SURVEY-1	Successful	Equipment	AHU-01	Number ODP	0		

Creating Readings

When adding a new Reading, realize that each Reading can be associated with a Capsule: Equipment, Property, Unit, Client, Contact, Project, Department, or Contract.

Adding the capsule to a Reading is optional but might make sense for reporting purposes if you choose to use it. For instance, an amperage measurement would likely be linked to the Equipment capsule, the temperature taken for HVAC work would make sense to be linked to a Unit or Property, while survey results for work performed could be linked to the Contact capsule. These capsules simply help reflect the nature of the Reading.

Each Reading is also defined via the Data Type field to indicate how the value will be recorded: Text, Date, Time, Currency, Checkbox, List, Number (ODP – 4DP).



The screenshot shows the 'Change Reading' form with the following fields and values:

- Code:** PASS/FAIL (left), 006AR (right)
- Description:** Pass Fail HVAC
- Title:** (empty text box)
- Notes:** (empty text box)
- Data Type:** Text (dropdown menu)
- List Choices:** Pass, Fail
- Exception:** Limit (dropdown menu)
- Include Upper Limit
- Upper Limit:** (empty text box)
- Upper Maintenance:** (empty text box with menu icon)
- Include Lower Limit
- Lower Limit:** Fail
- Lower Maintenance:** AHU-01-A (text box with menu icon) Annual Air Handling U...

The Exception field is for use in conjunction with an operation in the Work capsule called **Generate Work by Readings Exception**, a predictive maintenance function that checks work orders for readings that fall outside the prescribed Upper / Lower limits or Interval value and issues new corrective work based on the result. For more information, ask your client manager or see the Generate Work by Readings Exception quick reference document.

Readings & Work Types

Readings can be linked to Work Type records so that they default onto any work orders created for that specific Work Type. You can link Readings on the Readings tab at the bottom of Work Types.

An example of an HVAC-HOT Work Type record with Readings:

< Custom Fields Related Total Amounts Additional Amounts Time Materials Vendors Readings					
Reading	Title	Capsule	Code	Data Type	Value
DRY BULB	Dry Bulb	Property		Number ODP	
HUMIDITY	Humidity	Property		Number ODP	
T-STAT SE...	Set Point	Property		Number ODP	
T-STAT TE...	Stat Temp	Property		Number ODP	
				Text	

Adding a Work Order of work type HVAC-HOT defaults the above readings onto the work order:


< Custom Fields Related Total Amounts Additional Amounts Time Materials Vendors Readings Tasks Other Links Mitigation Timestamps Files Reminder							
Reading	Title	Capsule	Code	Data Type	Value	Date	Notes
DRY BULB	Dry Bulb	Property		Number ODP	0		
HUMIDITY	Humidity	Property		Number ODP	0		
T-STAT SE...	Set Point	Property		Number ODP	0		
T-STAT TE...	Stat Temp	Property		Number ODP	0		

When completing the work order, the user can then enter in the Readings' value, date, and record any notes.

Readings can also be directly added onto the bottom of any Work record through the Readings tab regardless of Work Type.

Work Readings

The Work Readings capsule is used to search the Readings on Work records to create a flexible list or report according to the user's needs.



Work Readings

View/modify Readings independent of their Work records

Work Reading Search

Range:	Capsule		to	Material	⏪
Range:	Exception	No	to	Yes	⏪
Value:	Date				⏪
Value:	Task				⏪
Value:	Notes				⏪
Work:					
Value:	Assigned To: Co...				⏪
Value:	Assigned To: Ve...				⏪
Value:	Assigned To: W...				⏪
Value:	Billable	No			⏪
Value:	Contract				⏪

Cross Capsule

Search
Cancel
Clear

You can:

- search based upon any field on a **Reading**.
- search for Readings based on **Work** Records.
- use the **Cross Capsule** search to narrow your results based on the Property, Client, Equipment, Unit and Project records. For instance, use Cross Capsule to see Readings taken for a certain Equipment Type.

The Work Readings Viewer is similar to the list view in other capsules throughout AwareManager. From this list you are able to sort the readings and print reports based upon your results.


Work Readings Viewer

Home
Refresh
Search
Sort
Print
Operations

Reading	Title	Capsule	Code	Data Type	Value	Date	Notes	Parent Marker
EXCEPTION		Vendor	DECK-HALLS	List	Yes	January 23, ...	"yes" notes	0004100BE
EXCEPTION		Vendor	DECK-HALLS	List	No	January 23, ...		0004100BE
HOLE IN DOOR	Hole in door	Vendor	DECK-HALLS	List	N	March 26, 20...	"N" selected	0004100BE
HOLE IN DOOR	Hole in door	Equipment	F-EX-2	List	Y	March 26, 20...	"Y" selected	0004100BE

Readings & Maintenance

Readings can be added to Task records for use with Preventive Maintenance work. As you enter Task records you are defining the procedures that will accompany PM work orders.



Tasks
Instructions of Recurring Fee procedures

Task 🏠 ☰ + 📄 ✎ 🗑️ 🔍 📅 📄 ✎ ✉️ ✉️

Code:

Description:

Equip Type:

Notes:

Show Notes On Work Report
 Print Readings After Task Notes On Work Report

< Custom Fields **Readings** Records Reminders

Reading	Description	Notes
T-STAT TEMP	Thermostat Temp...	
T-STAT SET POINT	Thermostat Set Po...	

When adding a new Task, use the Readings tab to link Readings records.

If you choose **Show Notes on Work Report**, you will also be able to select **Print Readings After Task Notes On Work Report** option. These options will make the Task notes and Readings print on any PM work orders that contain this Task.

Maintenance 💾 🚫 🖨️

Code: GENERATOR-TEST-W 006AR ☑ Inactive

Equipment: Generator # 1

Equip Type: GEN Emergency Generator

Contract:

Worker:

Property: 6 ARLNGTN 6 Arlington Street

Unit: 6 ARLNGTN-B Basement

Floor: B

Room: MECH

Contact:

Tenant:

Department: ENG Engineering

Description:

Commencement Date:

Last Scheduled Date:

Last Maintained Date:

Next Date:

Termination Date:

Source For Generating:

Frequency: 1 Days

Weekdays Only

Stop Month/Day: 15

Restart Month/Day: 15

Time To Schedule:

Notes:

< Custom Fields Defaults Other Links Additional Amounts Materials **Tasks** External Reminders


Task	Notes
HVAC	Record the Thermostat reading (temp)Record the Thermostat setting (set point)Take a dry bulb reading.

When creating the Maintenance record, simply add the Task (that has the linked Reading) to the Tasks tab.

Work orders generated from this Maintenance record will now contain the Task and Reading.

Readings as Surveys

The Web Settings capsule is also where you will enter Readings that will be used for surveys on the Portal Pages. On the Survey tab, the Question fields link to the Readings capsule.



Web Settings

Stores general settings for applications that are external to AwareManager


In the Readings capsule, **Custom Field 01** must be defined as the Survey Response field. For each Reading record that will act as a Survey, fill out the custom field with the responses you want to appear on the Portal Page.

Web Setting

Code: 6ARLINGTON 006AR

Description:

Paragraph:

Work Status: OPEN  Open

Use Work Type Work Status














←
Readings
Portal Home
Portal
Portal Links
Surveys
Form
Form Fields
Home Page
Work
Visitors
→

Reading	Title
T-STAT SE...	Set Point
WATER-T...	Water Temp Steam
<input type="text"/>	<input type="text"/>

Choose Reading

Code	Division	Capsule
AMP		Equipmen
DRY BULB		Property
HUMIDITY		Property
PASS/FAIL	006AR	
SURVEY-1		Material
SURVEY-2		Contact

Example of a Readings record configured to capture Survey Responses:

Reading             

Code: SURVEY-1

Description: Timeliness of response after submitting work order

Title: Successful

Notes:

Data Type: Number ODP

List Choices:

Exception: None

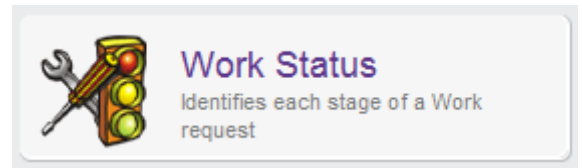
Custom Field 01

< Custom Fields Reminders

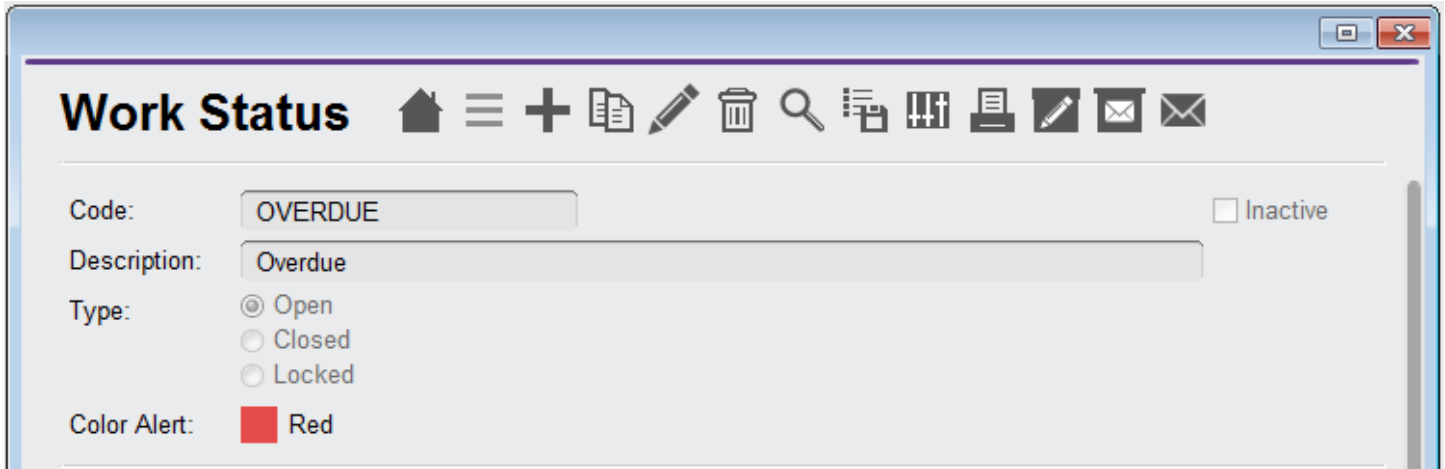
Survey Responses: Excellent, Average, Fair, Poor

Work Status

Work Statuses are used to identify each stage of a workflow. There is a natural order of statuses that work passes through; from the initial request for work to the final archiving of a work record.

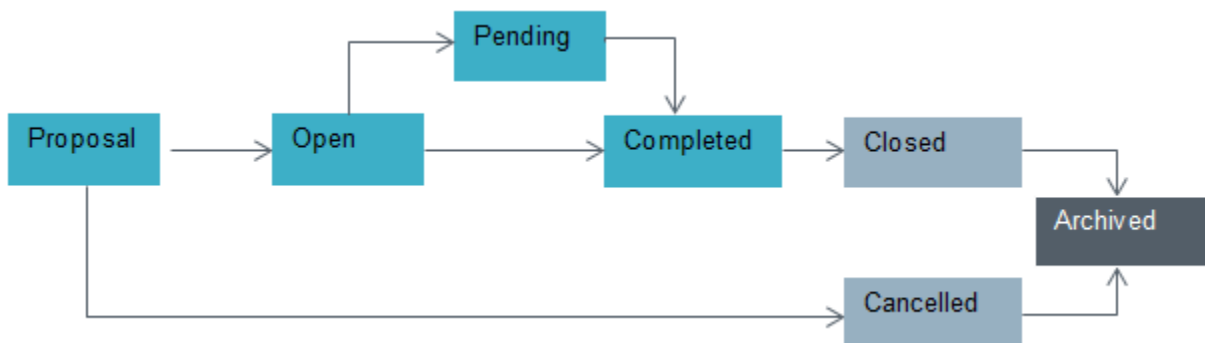


A work record's status will let you know how close you are to getting the work done. There is no limit to the number of statuses you can create.



Work Status Type

Each status must be associated with one of three *Status Types*; *Open*, *Closed*, or *Locked*. The diagram below illustrates a typical workflow. The purple boxes represent **Open** status types. The green boxes represent **Closed** status types and the dark green box represents a **Locked** status type. *Status Types* are used for reporting in the system. Certain reports will include ONLY **Open** status types; others will only include **Closed**, etc.



Statuses are also important to the *Work Trigger* feature in the system. The Work Trigger feature facilitates sending automated messages via email. *The Work Trigger feature is reviewed in detail in the Correspondence training session.*

Color Alert

The Color Alert feature will change the color of the Work Status field to a different color. This is helpful to draw attention to work records at specific statuses.

Work Type	Work Status	Description
HVAC-HOT	ARCHIVED	Too hot
PLUMB	COMPLETED	The sink in the kitch
CONSTRUCT	OVERDUE	Construction; We n
KEYS	OVERDUE	Keys, Locks, Doors
HVAC-HOT	ARCHIVED	Too hot; The office
SNOW	OVERDUE	Please remove the
LIGHTS	ARCHIVED	The light in the ladie

Work Status Tabs

Automatic Timer

The screenshot shows the 'Work Status' configuration window with the 'Automatic Timer' tab selected. The interface includes a toolbar with icons for home, menu, add, edit, delete, search, and other functions. The main configuration area contains the following fields:

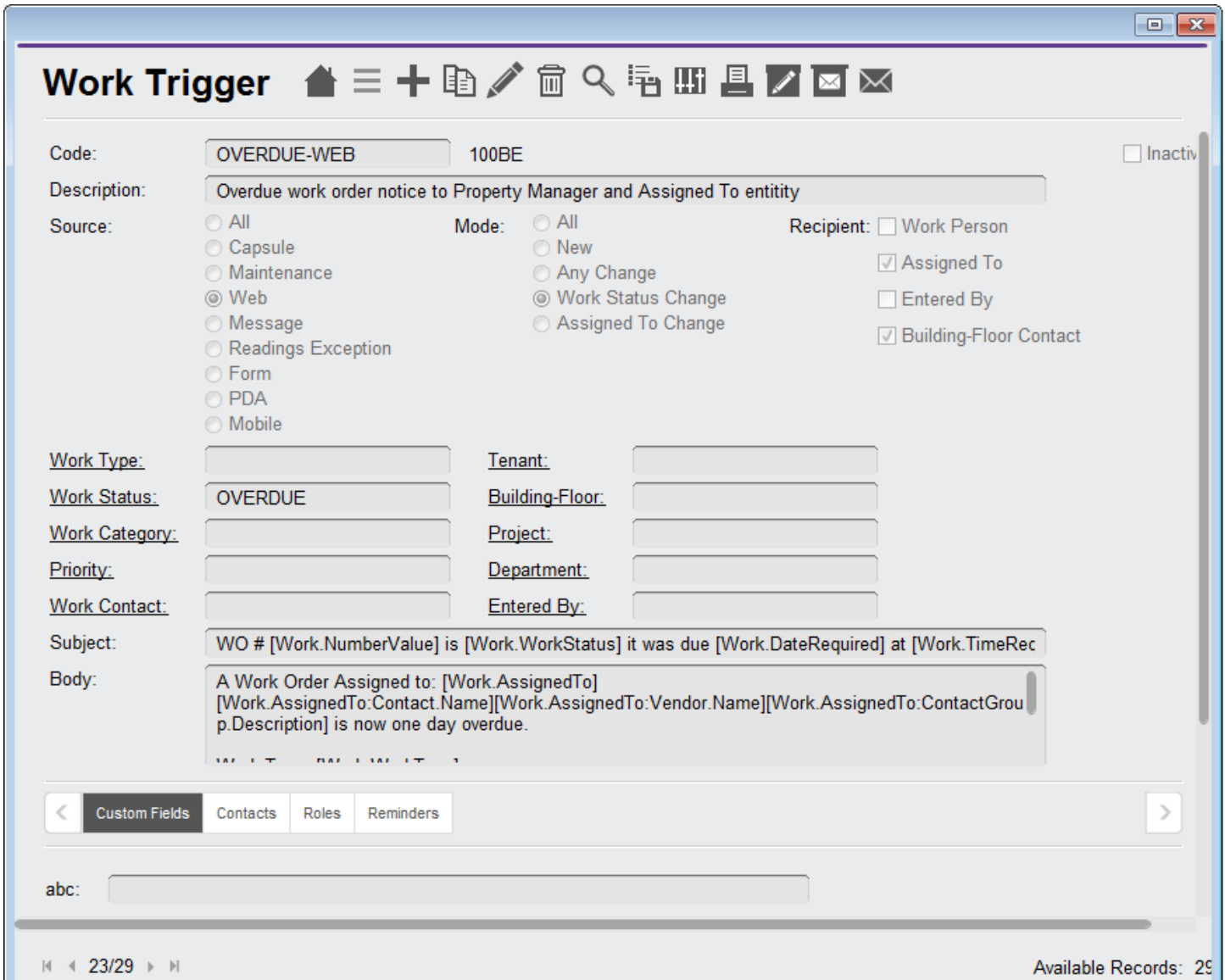
- Code:** OVERDUE
- Description:** Overdue
- Type:** Open (selected), Closed, Locked
- Color Alert:** Red (selected)
- Automatic Timer:** V-7 DAY, 7 days Untill Required
- Days:** 5
- Hours:** 0














At the bottom of the window, there is a navigation bar showing '10/21' and 'Available Records: 21'.

This feature will adjust the status of all work orders to the status identified in the *Timer Work Status* based upon the criteria entered in the *Days*, *Hours*, and *Minutes* fields related to the *Trigger Date* defined.

In this example all **OPEN** work orders with a **Date required** that is five days overdue will be automatically updated to a status of OVERDUE.

Often the Automatic Timer feature is paired with the creation of a Work Trigger (defined based on the status change to OVERDUE) to notify key staff.



Work Trigger             

Code: Inactive

Description:

Source: All Capsule Maintenance Web Message Readings Exception Form PDA Mobile

Mode: All New Any Change Work Status Change Assigned To Change

Recipient: Work Person Assigned To Entered By Building-Floor Contact

Work Type: Tenant:

Work Status: Building-Floor:

Work Category: Project:

Priority: Department:

Work Contact: Entered By:

Subject:

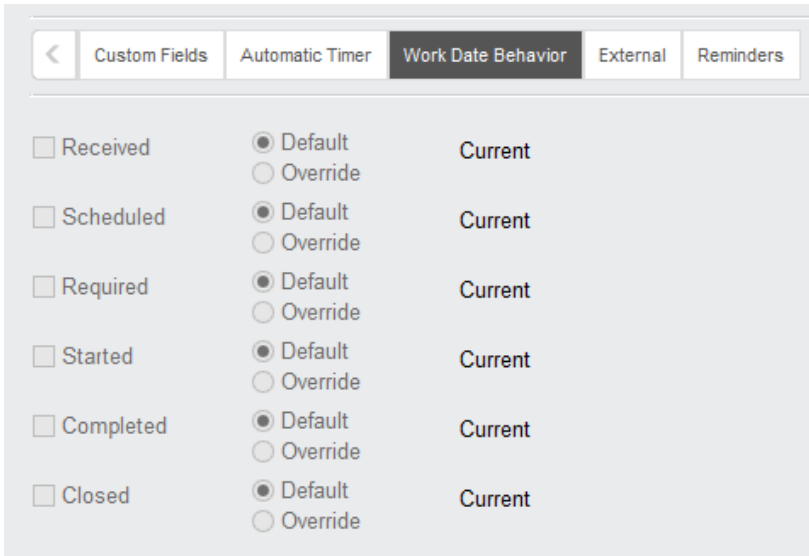
Body:

abc:

23/29 Available Records: 25

Note: Work Triggers are found on the Correspondence tab.

Work Date Behavior

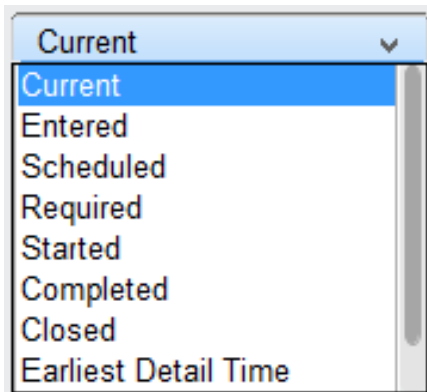


Work Status	Default	Override	Source
Received	<input checked="" type="radio"/>	<input type="radio"/>	Current
Scheduled	<input checked="" type="radio"/>	<input type="radio"/>	Current
Required	<input checked="" type="radio"/>	<input type="radio"/>	Current
Started	<input checked="" type="radio"/>	<input type="radio"/>	Current
Completed	<input checked="" type="radio"/>	<input type="radio"/>	Current
Closed	<input checked="" type="radio"/>	<input type="radio"/>	Current

The Work Date Behavior tab is where you can set up which dates will default on your Work orders. In order to set up date fields that populate automatically, you will follow three simple steps:

1. Place a check in the box beside each type of date you want to populate.
2. Choose either **Default** or **Override**.
 - o **Default** will cause only blank date fields to be populated.
 - o **Override** will populate date fields that are already filled in with new information.
3. Choose where you want the populated date to pull from.

For Step 3, you have several options to choose from:



- **Current:** will default to the current date.
- **Entered:** will default based on the existing Date Entered.
- **Scheduled:** will default based on the existing Date Scheduled.
- **Required:** will default based on the existing Date Required.
- **Started:** will default based on the existing Date Started.
- **Completed:** will default based on the existing Date Completed.
- **Closed:** will default based on the existing Date Closed.
- **Earliest Detail Time:** will default based on the earliest date and time listed under the Time tab of the work order.
- **Latest Detail Time:** will default based on the latest date and time listed under the Time tab of the work order.