Automated Work Posting

Quick Reference

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.

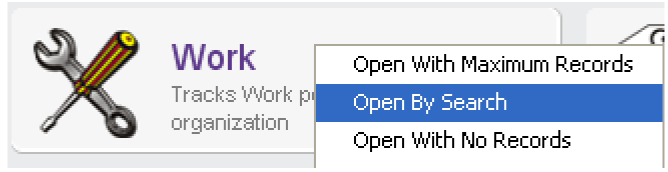
Summary Report by Tenant

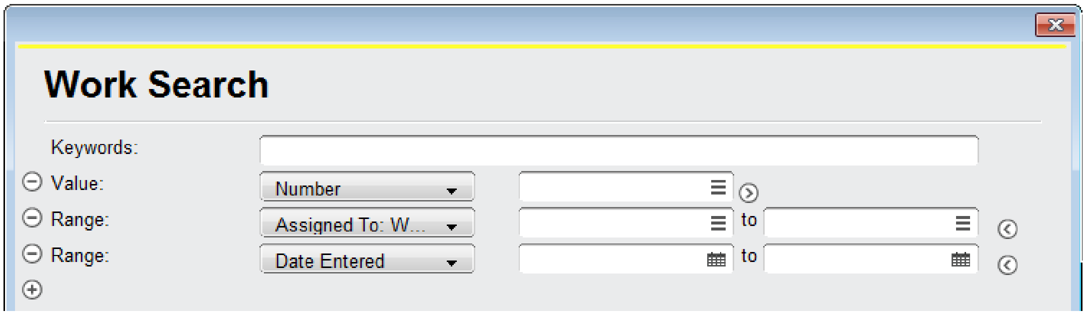
For each tenant included, it will generate an email to their *Billing Contact* which includes:

- *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

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.***

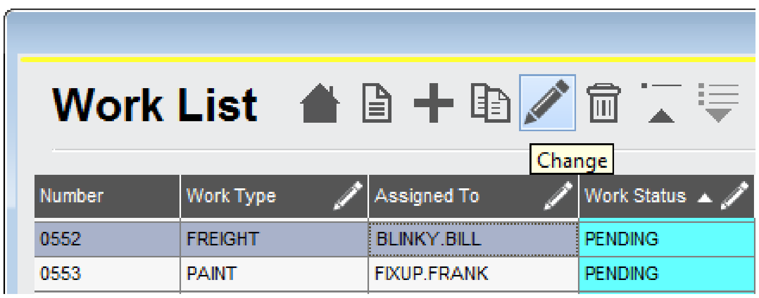


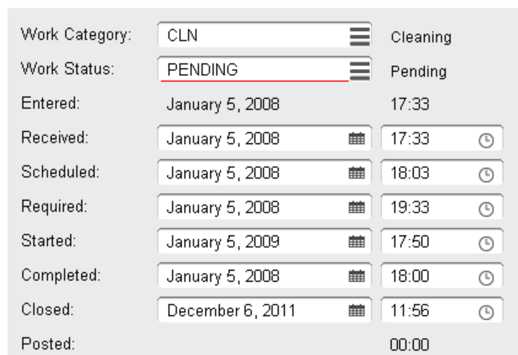


HINT: create a Recordset to make accessing your open work quick and easy. *Refer to our Recordset Quick Reference.*

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):





- **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:

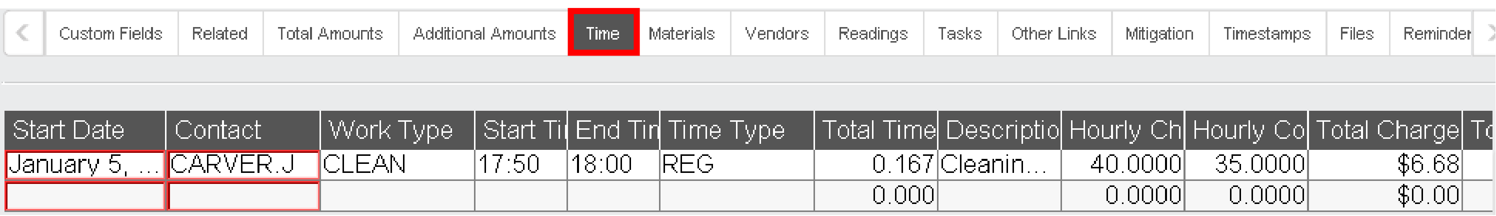
- **Description**: Review Description and edit if necessary.

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

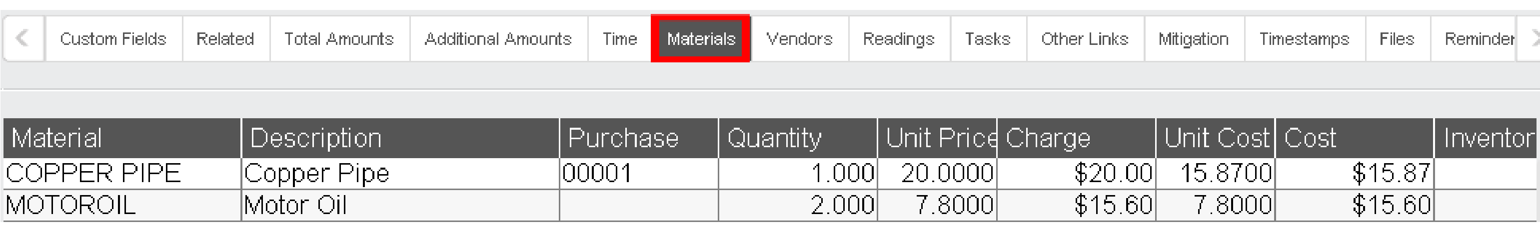
- **Notes**: Record any details regarding the work in the Notes field. Typically this is used to record what action was taken to resolve the issue.

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

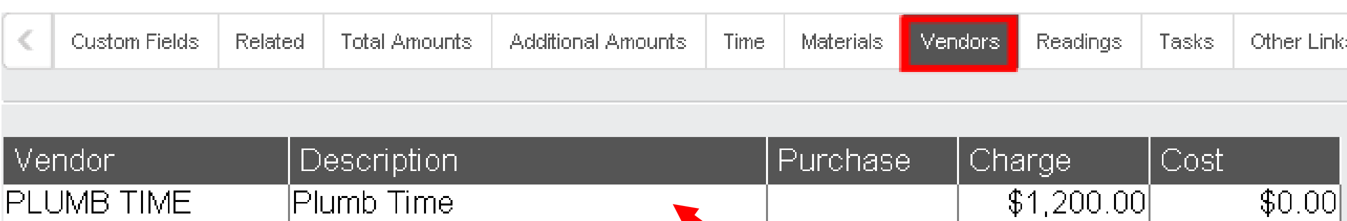
- **Work Details**: Enter details in the tabs at the bottom of the work record; Time, Materials and Vendors.
  - Charge rates will only default on work orders with the Billable checkbox checked.
  - Even if the work order is non-billable, enter the values to record cost details.
  - If the Charge field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



Start Date	Contact	Work Type	Start Ti	End Tin	Time Type	Total Time	Descriptio	Hourly Ch	Hourly Co	Total Charge	To
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.

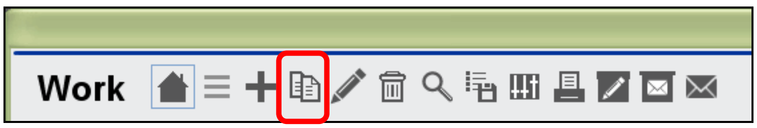
TIP: Enter the Invoice number for any Vendor Invoices into the Description field.

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.

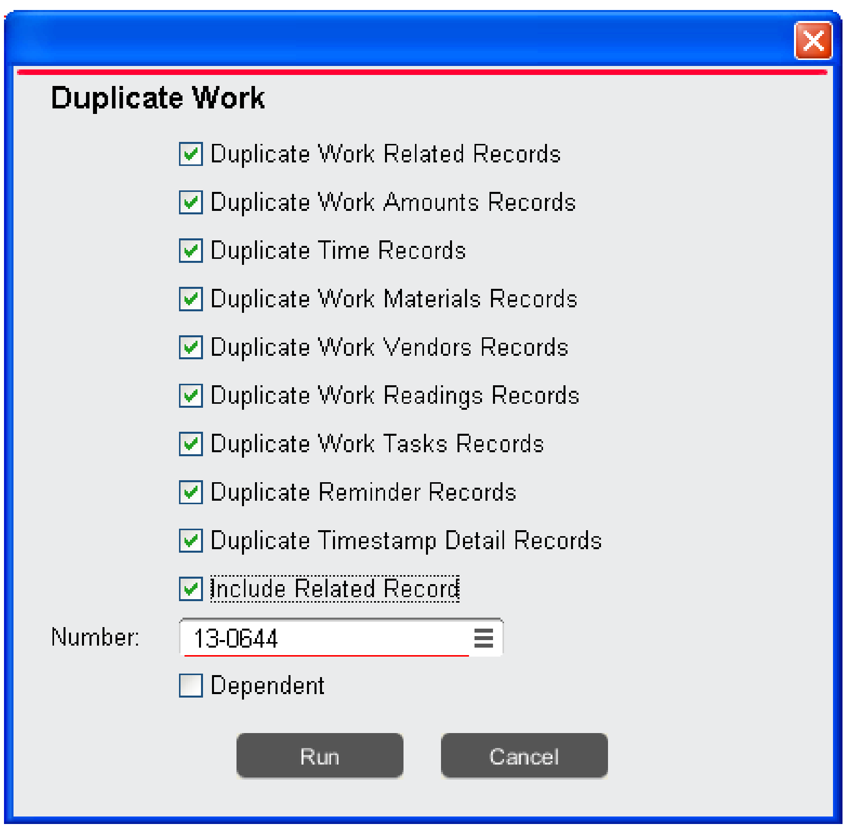
This process provides a clear paper trail that accomplishes three things: preserving the original record, negating the incorrect information, and providing correct information.

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:



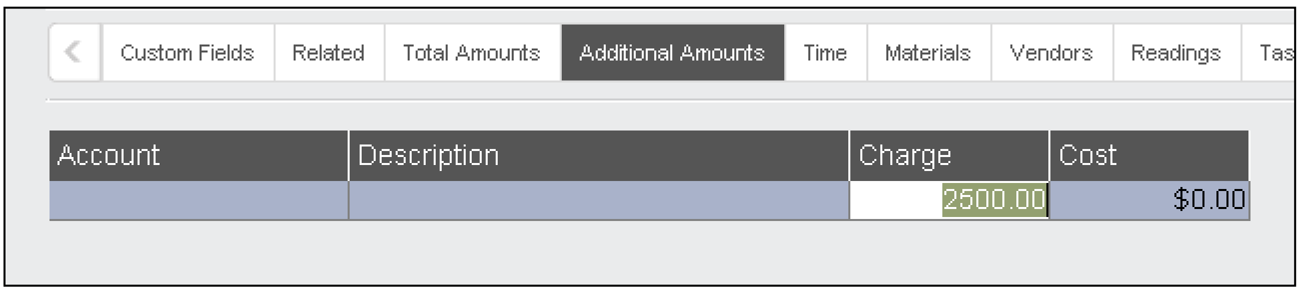
3. In the resulting pop-up box labeled "Duplicate Work," make sure all boxes except for "Dependent" are checked, and then click Run. This will create a new, editable record with the information for the old record already in place.

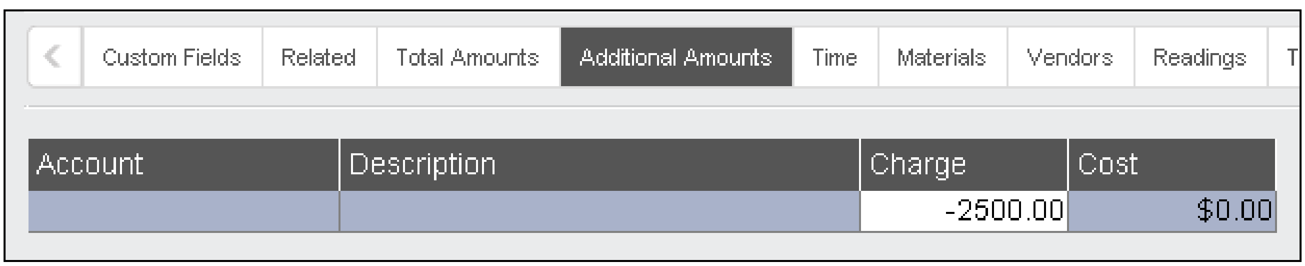


4. Go through the work record and negate all dollar amounts by placing a minus sign (-) in front of either the quantity or the dollar amount. Dollar amounts are entered in several places in a typical work record. You will need to check all of the following tabs to make sure you correctly negate all dollar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





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.

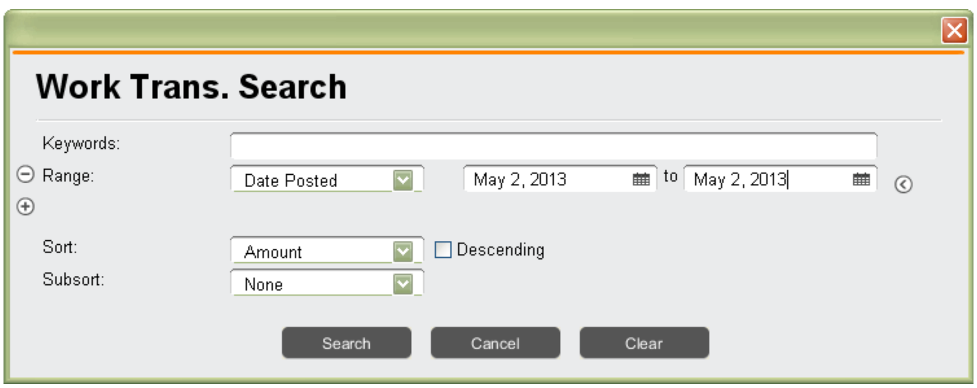
To make corrections:

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.

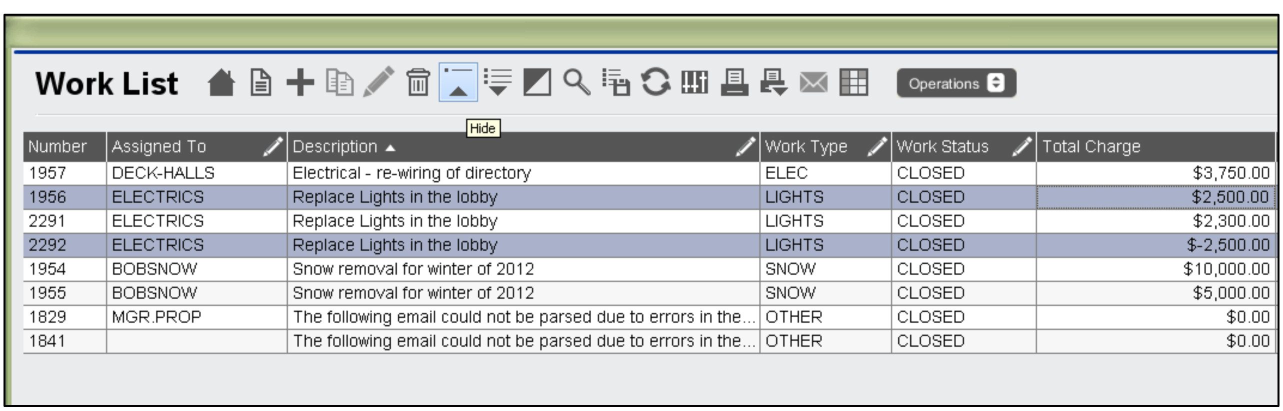
For more information on posting, see **Posting.pdf**.

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.



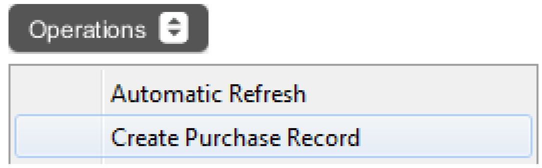
3. In this list, you will need to find the transactions for the incorrect work record and its negative. Once you have found them, hide them from the list.



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.

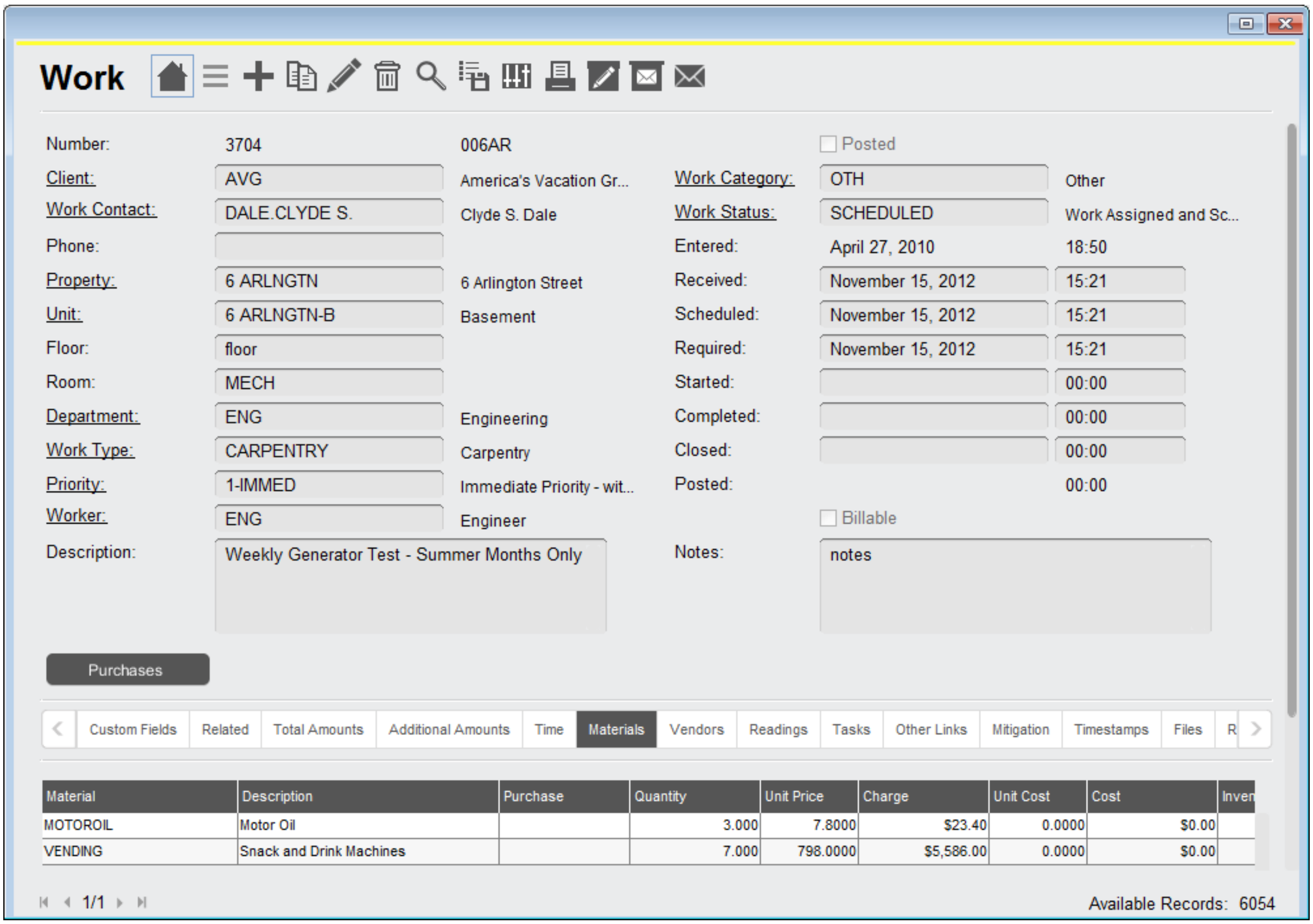


The **Create Purchase Record Operation** in the AwareManager allows you to create a new Purchase record from the Work list based upon a Work record.

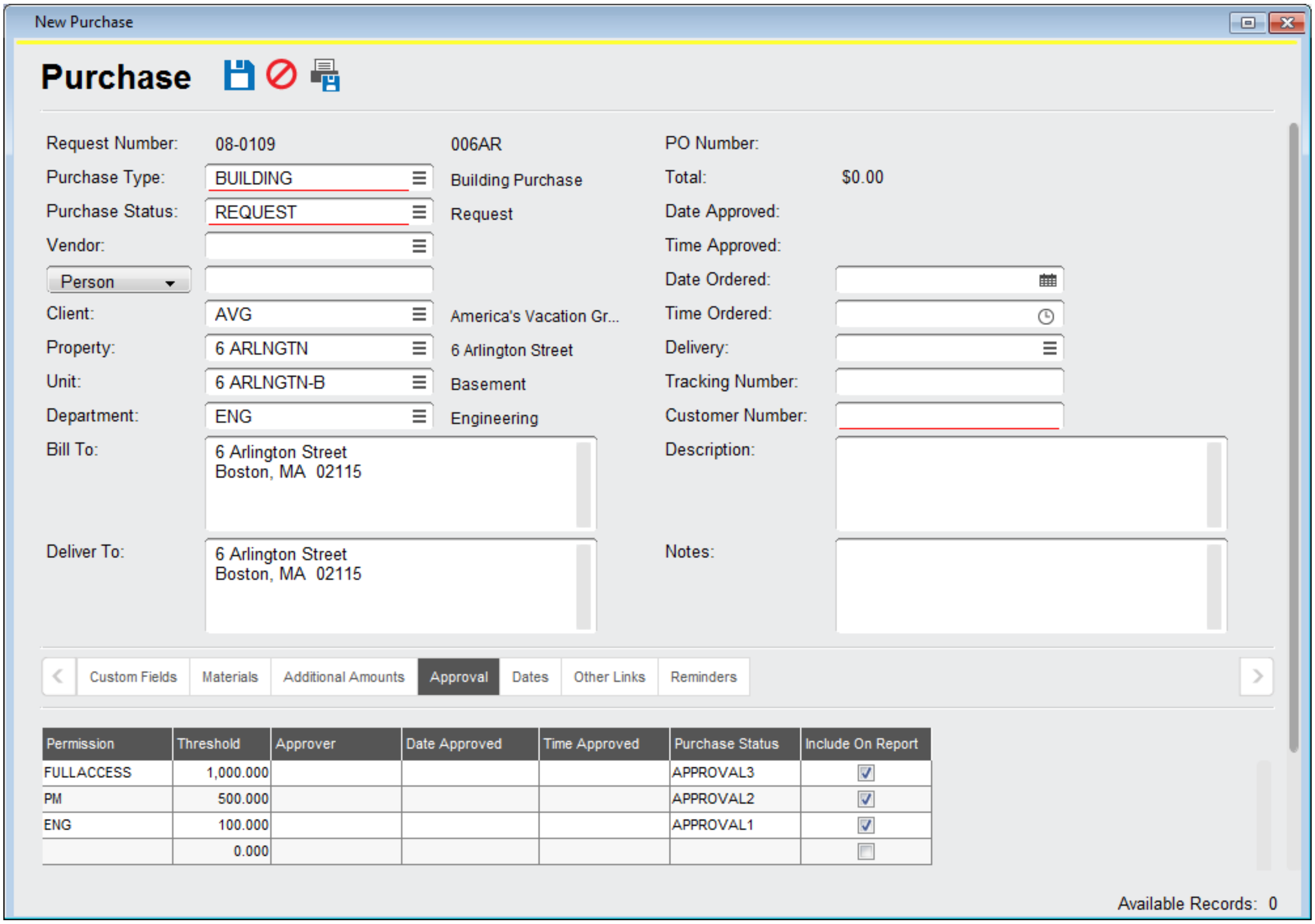
When selected, the new Purchase record will automatically default information such as *Vendor, Client, Property, Unit, Department, Materials, Work Number, Contract, Project* and *Paragraph* from the highlighted Work record.

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:

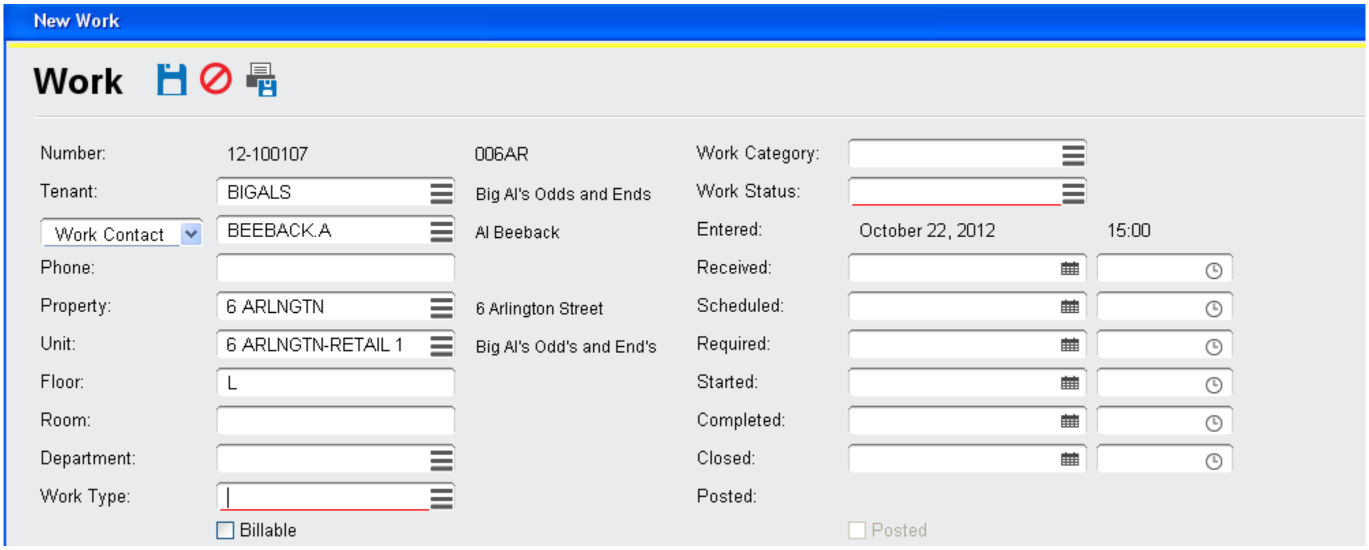


When this operation is selected, a new Purchase record will open (with defaulted information):



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.

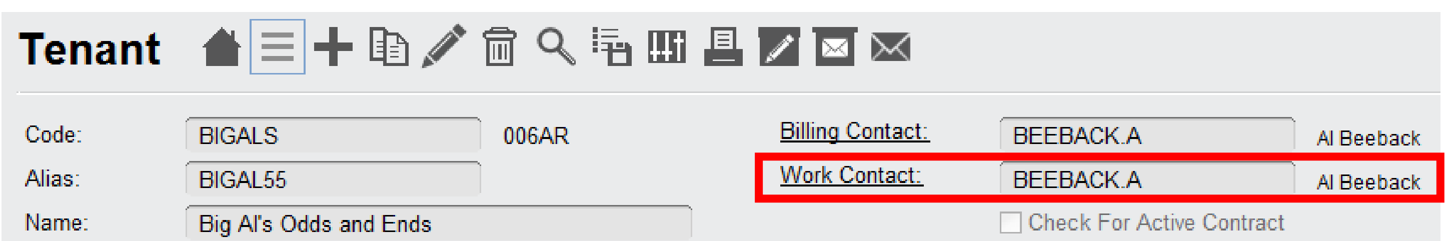


When you first add a new Work record most of the fields are blank. After you enter the first piece of information (e.g. the Tenant code *BIGALS*) and press Tab, some fields default including the *Work Contact, Property, Unit and Floor.* You can change defaulted information at any time.

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.**

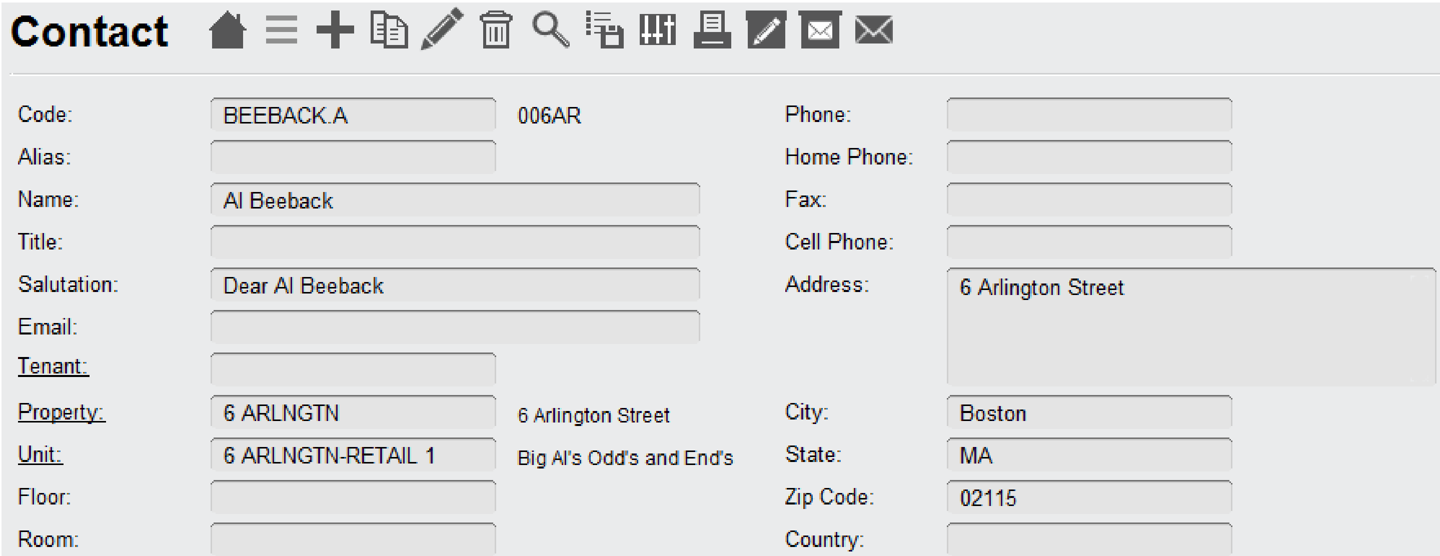
1. AwareManager looks up the Tenant record that is entered.
2. If there is a value in the *Work Contact* field it defaults onto the work order.

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



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.

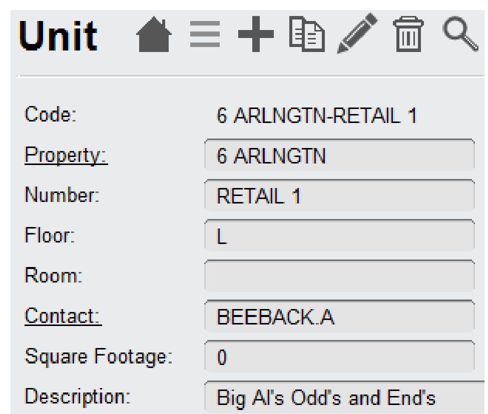


This is where Al's *Name* is stored, and where the *Property* and *Unit* came from that appeared on the Work order.

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)

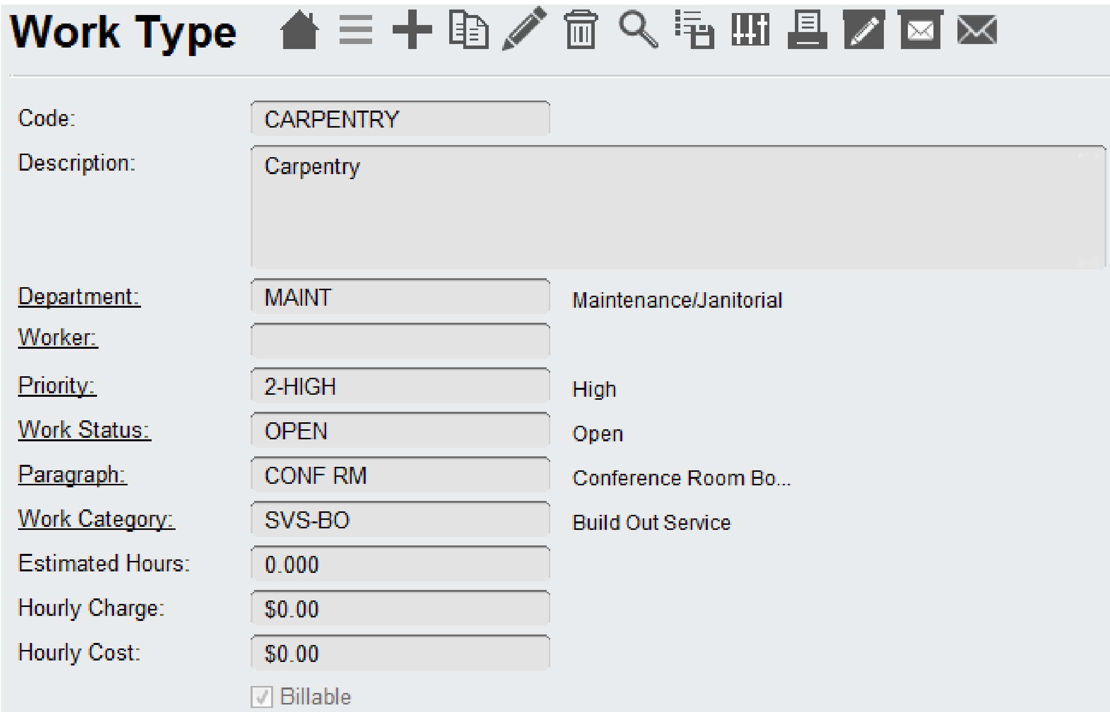
5. AwareManager then looks at the *Unit* record. If there is a value in the *Floor*, *Room*, and *Description* fields – it defaults them onto the Work order.



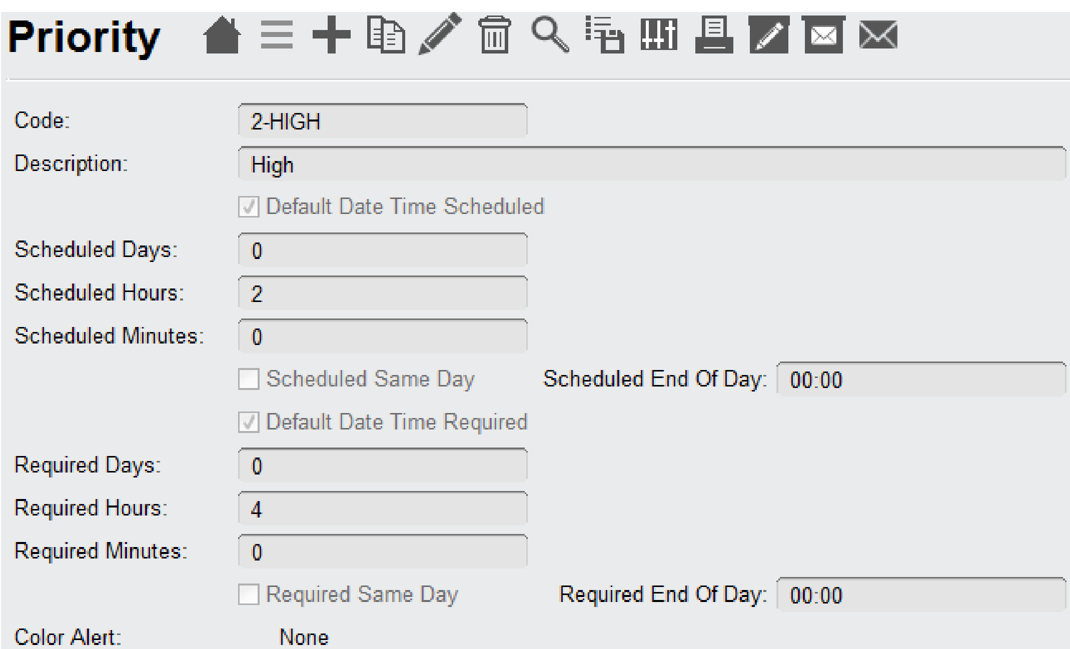
This is how Floor L and Big Al's Odd's and End's appeared on the work order.

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

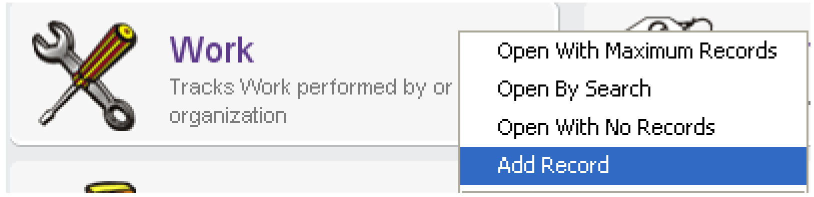
6. A *Work Type* code is entered and AwareManager looks up that work type record.
7. If there are values in the *Department, Worker, Billable and Priority* fields, it defaults them onto the work order.



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.*

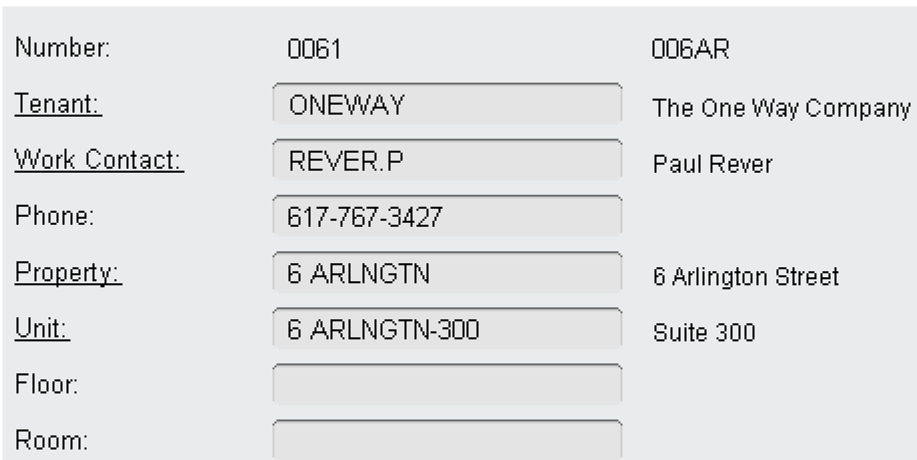


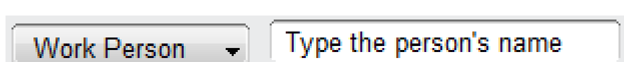
1. Right-click on **Work** and select **Add Record,** or **Open By Search** and click **New** from the list/form.



2. Enter information into the following fields:

The top of the Work window records WHO and WHERE:



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 Work Contact to **Work Person** by clicking on the down arrow. 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.

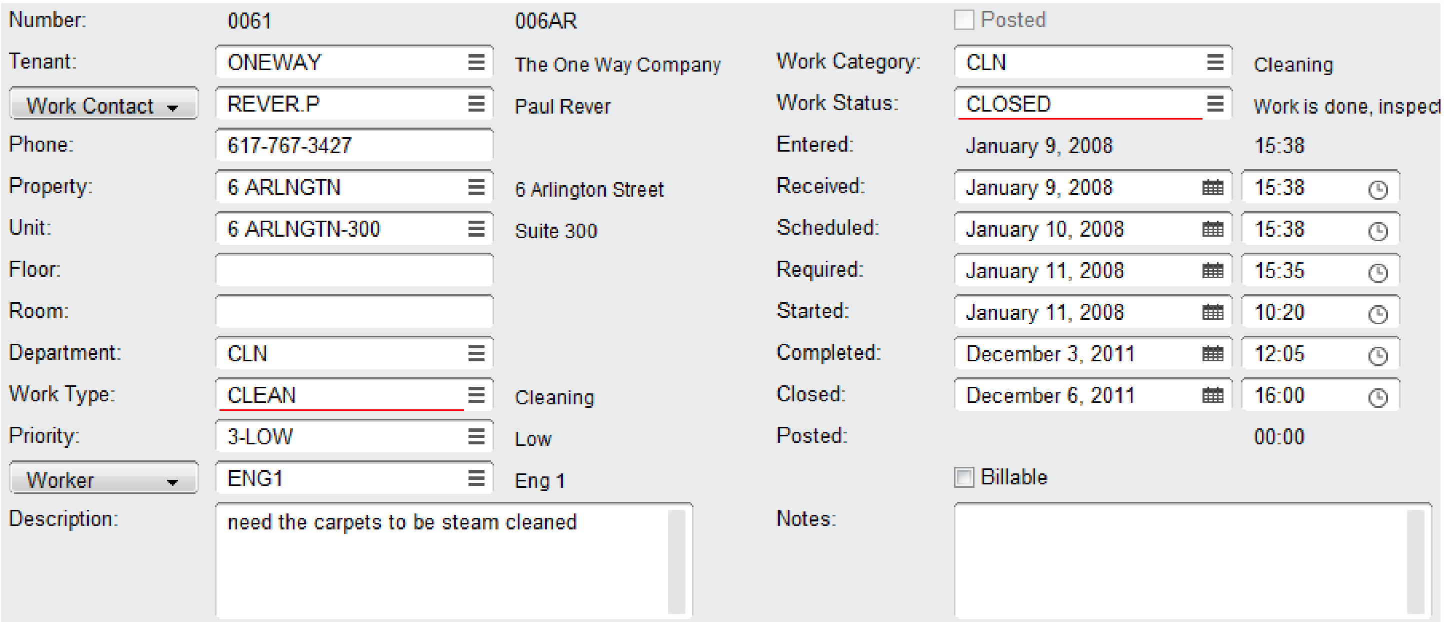
Unit	This should default based upon the client/tenant; if it is incorrect or blank adjust it accordingly. **Note**: If the Unit is not in the list, select the record for the floor and use the Room field to record the Unit.
Floor	The Floor field will default based upon the Unit.
Room	The Room field can 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.

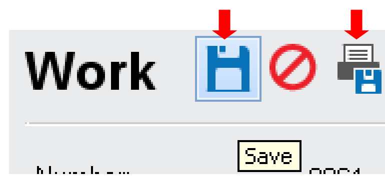
3. Enter information into the following fields:

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.



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

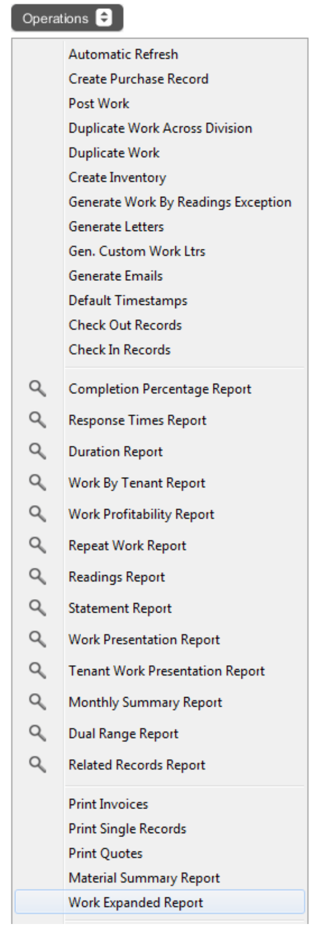


Expanded Reports
Quick Reference

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**:

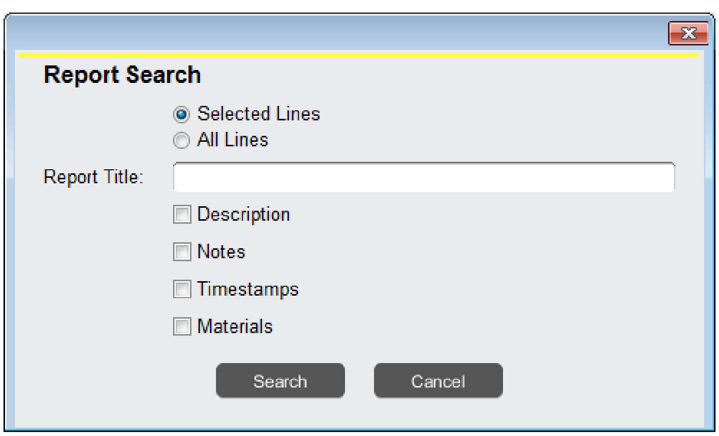
- Work
- Maintenance
- Insurance
- Inventory
- Reminders



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:

AwareManager jxt

Work Report
DIG Property Group
50 Congress Street
Boston, Massachusetts 02109

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

Division	Number	Work Status	Time Entered	Time Received	Date Entered	Work Type	Client
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						

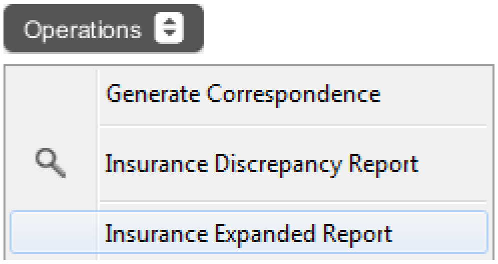
Materials:	Code	Description	Quantity
	BALLAST R-1600	Ballasr R-1600	2.000
	LUMBER-2X4	Lumber - 2x4 (priced per foot)	2.000

Printed Thu Nov 8 15:41:40 EST 2012

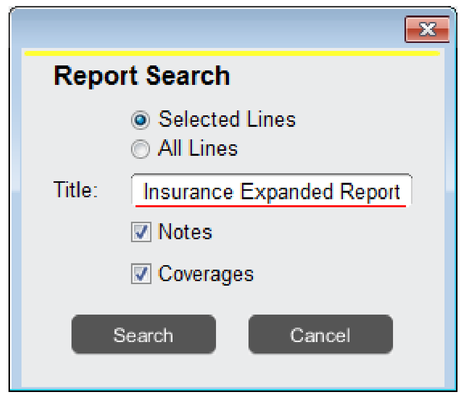
Page 1 of 3

Insurance Expanded Report

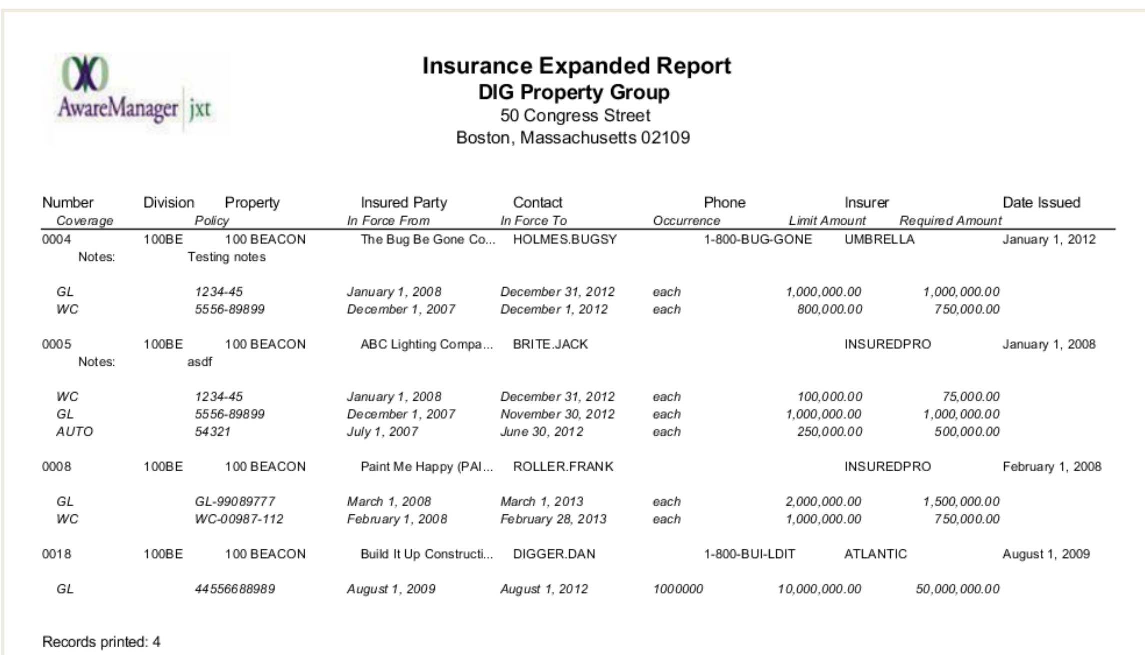
Access this report through the Operations menu in the Insurance Capsule.



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:



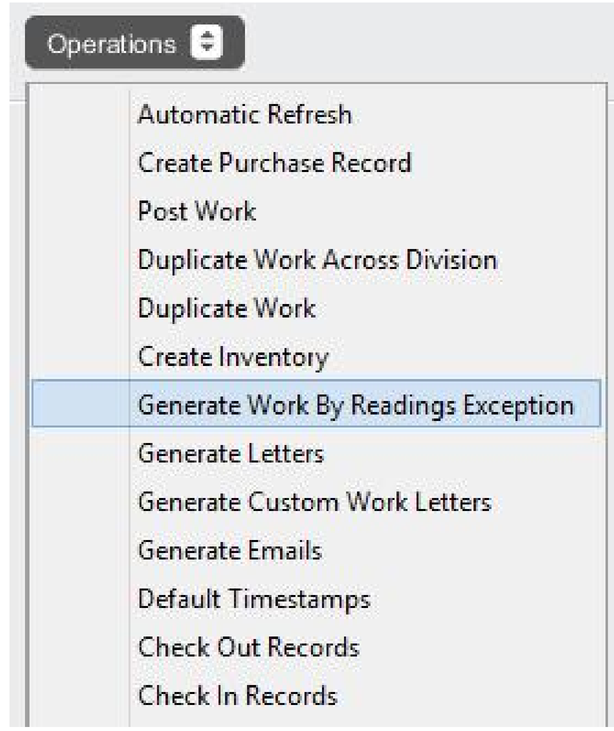
Insurance Expanded Report
DIG Property Group
50 Congress Street
Boston, Massachusetts 02109

Number / *Coverage*	Division	Property / *Policy*	Insured Party / *In Force From*	Contact / *In Force To*	Phone / *Occurrence*	Insurer / *Limit Amount*	*Required Amount*	Date Issued
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

AWAREMANAGER

Generate Work by Readings Exceptions
Quick Reference



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.

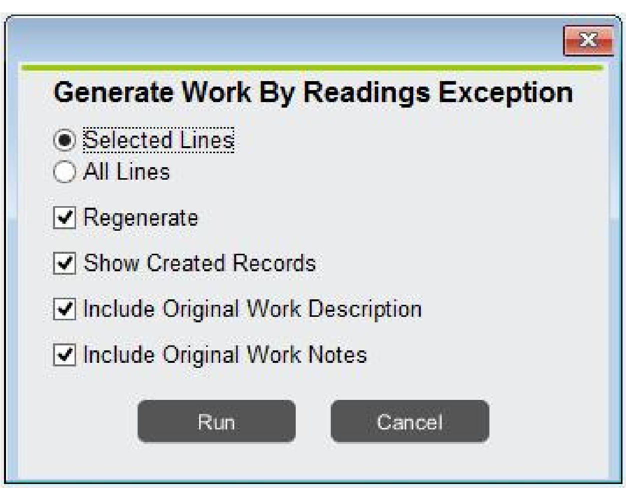
Note: When you generate work in this manner, a new work order will be generated for each individual exception. For example, if you have five readings on a single work order, and three of those readings have exceptions, three separate work orders will be created: one for each exception.

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).

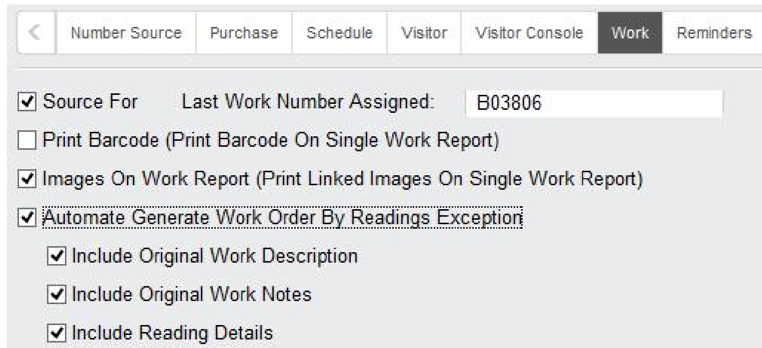
o **Include Original Work Notes**: if you would like the text in the Notes field of each original work order to be included on the corresponding new work order(s).

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:



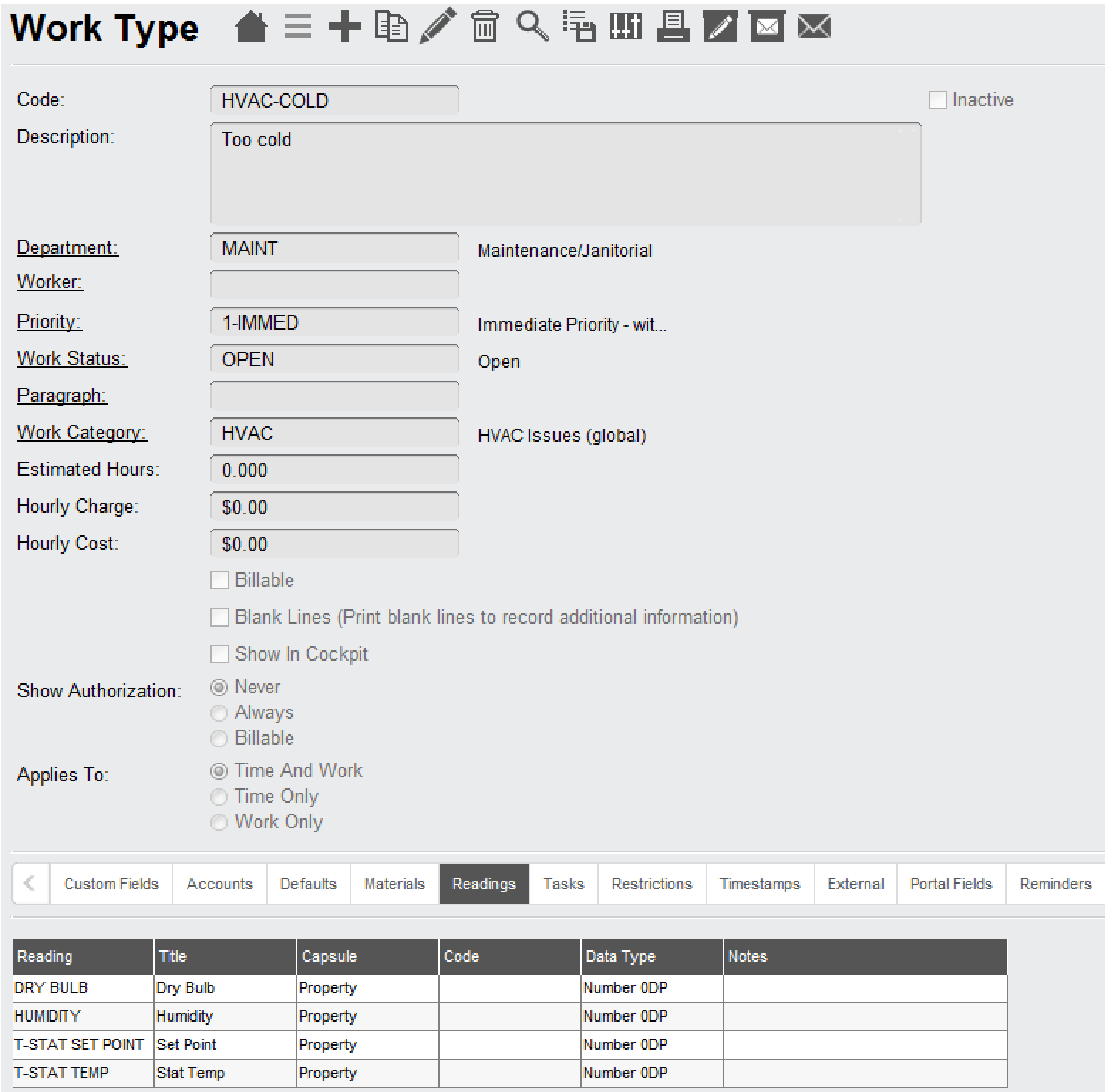
- *Automate Generate Work Order By Readings Exception* – select this for the system to check for readings exceptions every time a reading is saved.
- *Include Original Work Description* – if you would like the text in the Description field of each original work order to be included on the corresponding 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

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: HVAC-COLD
Inactive
Description: Too cold
Department: MAINT Maintenance/Janitorial
Worker:
Priority: 1-IMMED Immediate Priority - wit...
Work Status: OPEN Open
Paragraph:
Work Category: HVAC HVAC Issues (global)
Estimated Hours: 0.000
Hourly Charge: $0.00
Hourly Cost: $0.00
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

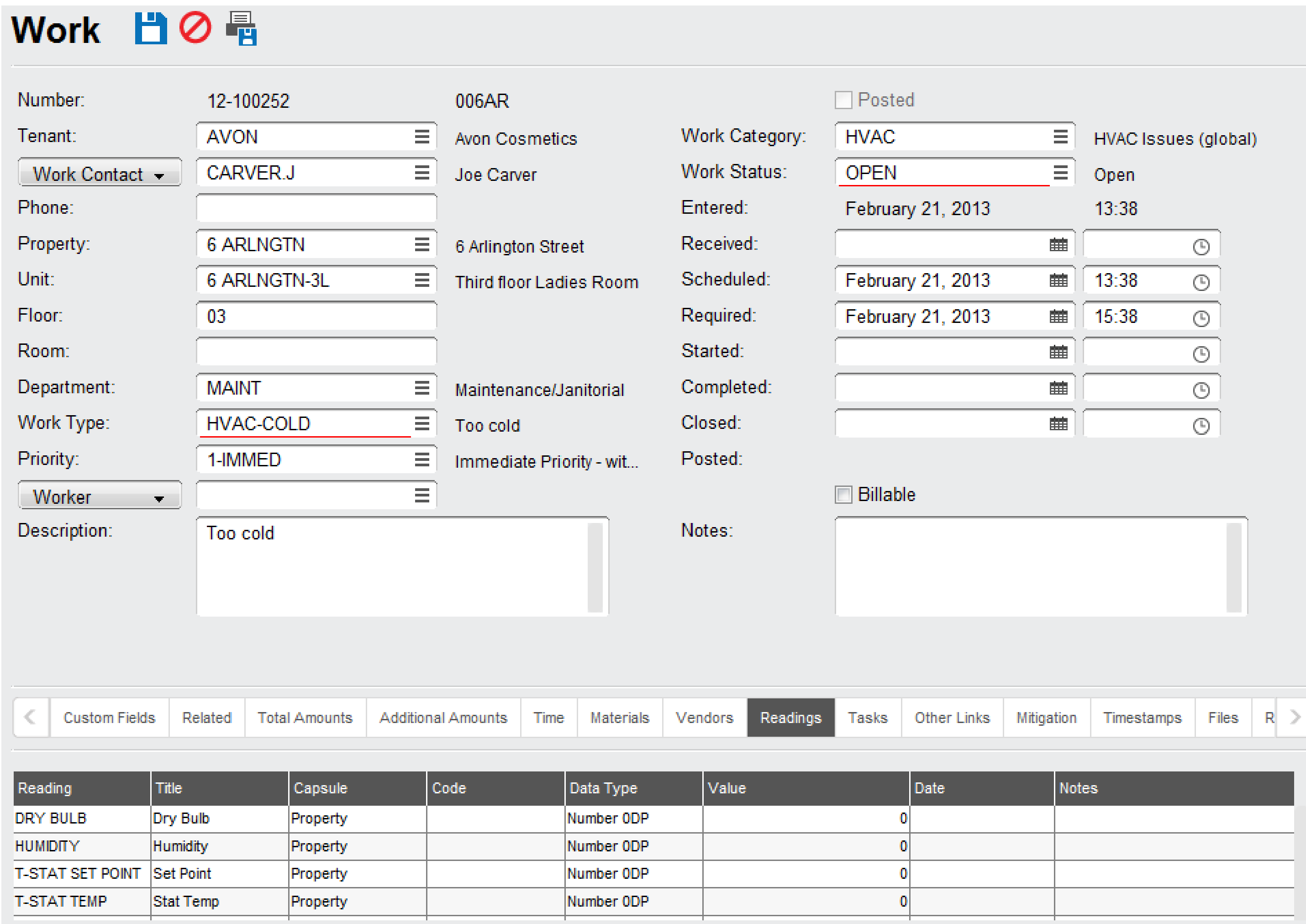
Reading	Title	Capsule	Code	Data Type	Notes
DRY BULB	Dry Bulb	Property		Number 0DP	
HUMIDITY	Humidity	Property		Number 0DP	
T-STAT SET POINT	Set Point	Property		Number 0DP	
T-STAT TEMP	Stat Temp	Property		Number 0DP	

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!



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.

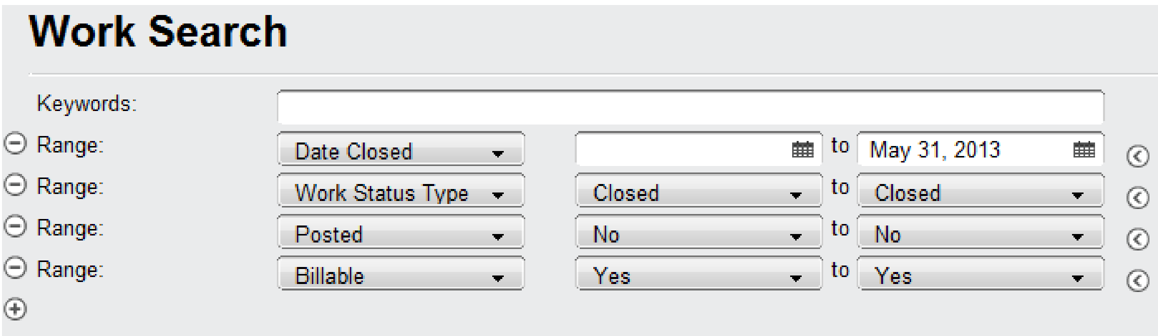
This quick reference will show the simple steps to posting your Work Orders using the AwareManager

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

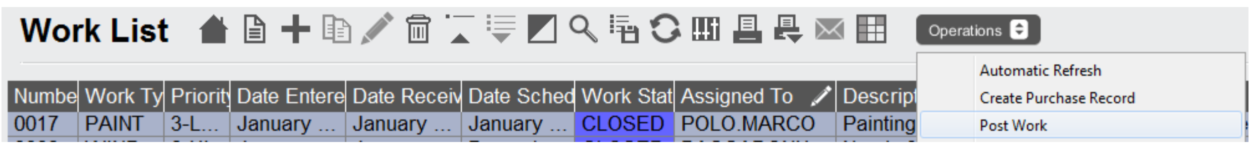
- Bill Code

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.

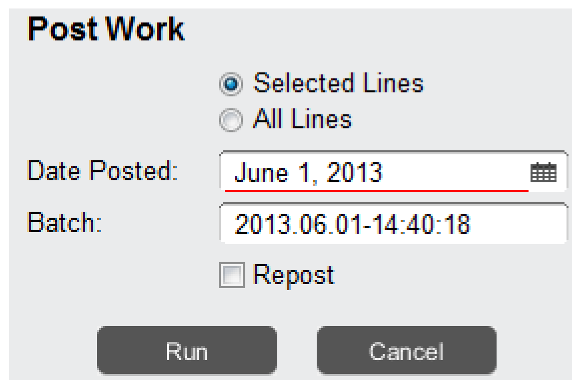
6. **Once all the corrections are made you are ready to post.**

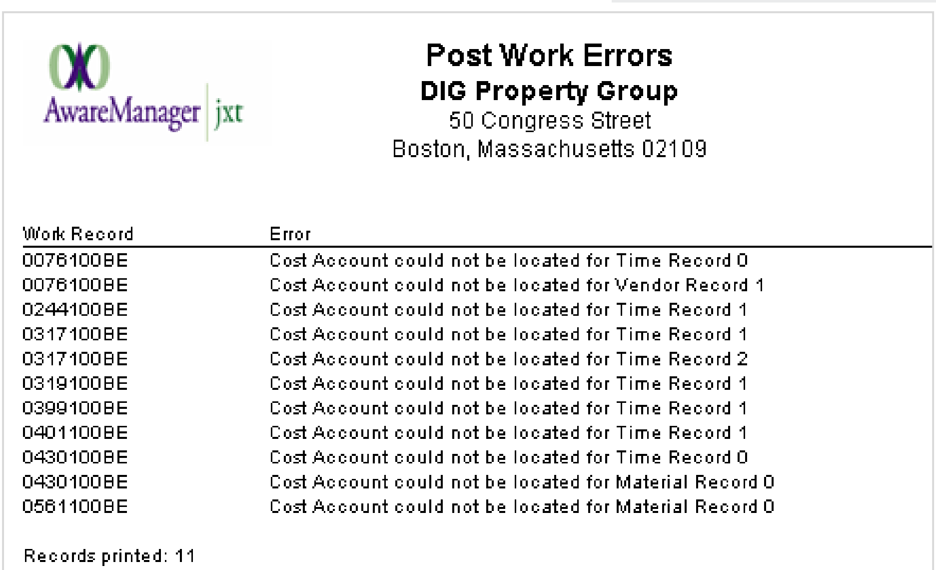
7. Highlight all work orders to be posted and, using the operations button, select Post Work



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.





Post Work Errors
DIG Property Group
50 Congress Street
Boston, Massachusetts 02109

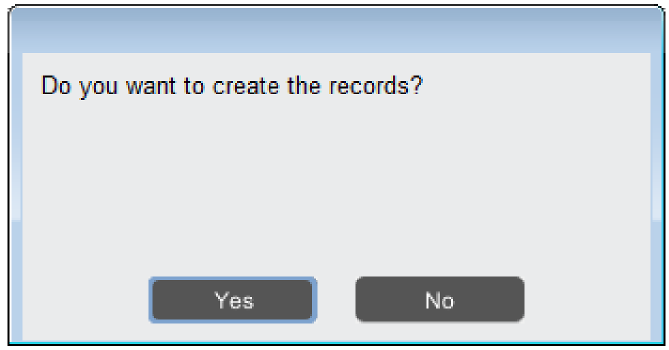
Work Record	Error
0076100BE	Cost Account could not be located for Time Record 0
0076100BE	Cost Account could not be located for Vendor Record 1
0244100BE	Cost Account could not be located for Time Record 1
0317100BE	Cost Account could not be located for Time Record 1
0317100BE	Cost Account could not be located for Time Record 2
0319100BE	Cost Account could not be located for Time Record 1
0399100BE	Cost Account could not be located for Time Record 1
0401100BE	Cost Account could not be located for Time Record 1
0430100BE	Cost Account could not be located for Time Record 0
0430100BE	Cost Account could not be located for Material Record 0
0561100BE	Cost Account could not be located for Material Record 0

Records printed: 11

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.**

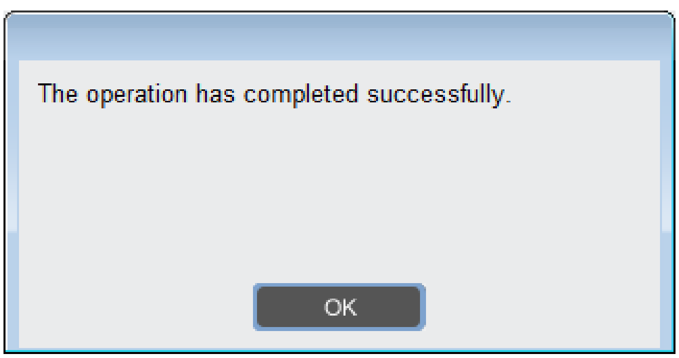


12. Once you choose YES, the work orders will post and the transaction list will open.

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.