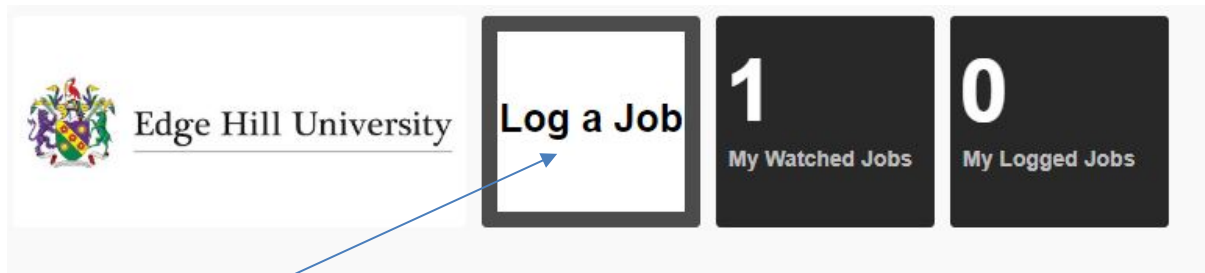


Log a Job to FM

We recommend Google Chrome when using My Jobs via a Desktop PC.

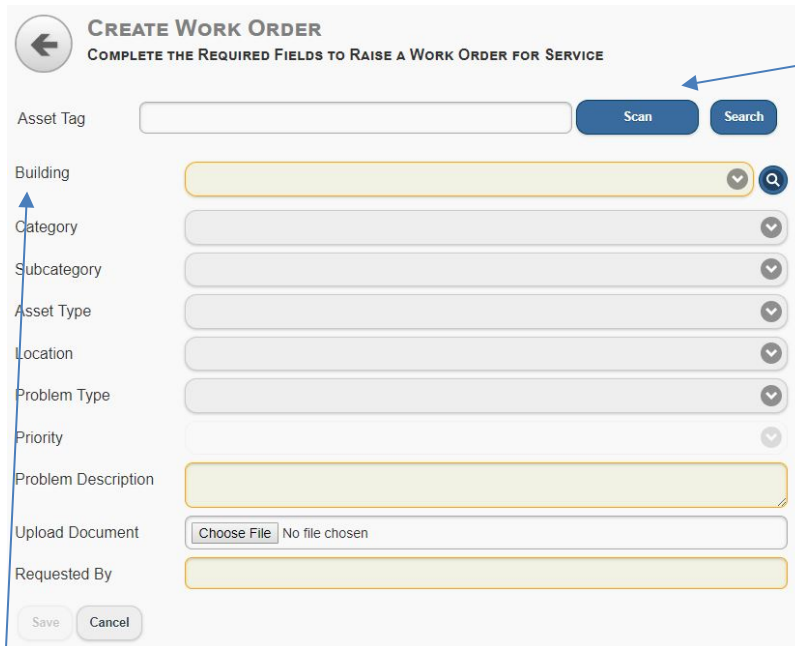
Select the **Log a Job** icon and enter your User Name and Password, this is your Edge Hill University User Name and Password, click **Login**.

You will see a screen of available tiles like the below.



Click this tile.

The tile will open, and you will see the following.



To Log a Job, if you are using a mobile device – phone or tablet; you can scan the asset tag barcode by clicking the **Scan** button.

An example of a barcode is below.



Once you scan in the barcode several fields will automatically populate.

If you are using a PC, click the dropdown arrow next to **Building** field and select your building.

Any fields remaining in yellow will require input from you before you can save the Job.

Please see the below example.

CREATE WORK ORDER
COMPLETE THE REQUIRED FIELDS TO RAISE A WORK ORDER FOR SERVICE

Asset Tag: 0000046 [Scan] [Search]

Building: SC [v] [Q]

Category: Mechanical [v]

Subcategory: Expansion Vessel [v]

Asset Type: Expansion Vessel - Heating [v]

Floor Level: First [v]

Location: Sport and Physical Activity [v]

Problem Type: [v] (highlighted in yellow)

Priority: P5 Minor Effect [v]

Problem Description: [v] (highlighted in yellow)

Upload Document: [Choose File] No file chosen

Requested By: [v] (highlighted in yellow)

[Save] [Cancel]

Next you will need to select the **Problem Type**.

This type will vary depending on the Job you are logging.

In this example Service has been selected from the **Problem Type** options.

Depending on the **Problem Type** selected you may have additional required fields to complete.

Required fields are highlighted in yellow.

accruent

CREATE WORK ORDER
COMPLETE THE REQUIRED FIELDS TO RAISE A WORK ORDER FOR SERVICE

Asset Tag: 0000046 [Scan] [Search]

Building: SC [v] [Q]

Category: Mechanical [v]

Subcategory: Expansion Vessel [v]

Asset Type: Expansion Vessel - Heating [v]

Floor Level: First [v]

Location: Sport and Physical Activity [v]

Problem Type: [v] (highlighted in yellow)

Priority: [v]

Problem Description: [v] (highlighted in yellow)

Upload Document: [Choose File] No file chosen

Requested By: [v] (highlighted in yellow)

[Save] [Cancel]

Problem Type dropdown options: Inspection, Repair, Replace, Service (highlighted in blue)

Add in a brief description of the problem into the **Problem Description** field.

Once you have added text into the description, you have the option to upload an image via the **Upload Document** field (this is not a required field).

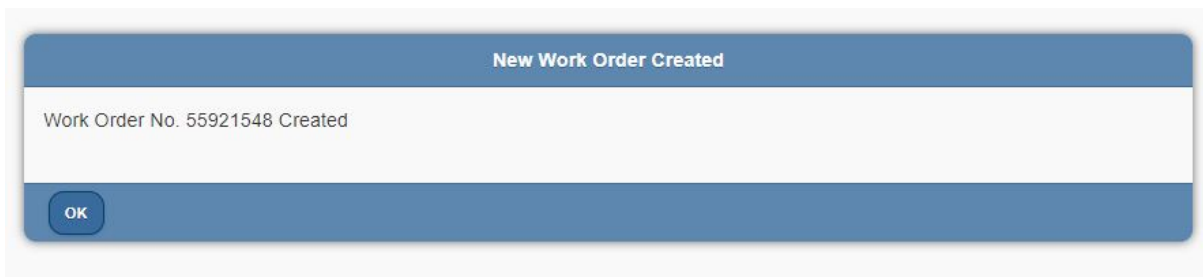
If you do wish to upload an image if you are logging a Job via your mobile device by clicking **Choose File** your camera will open, and you will be able to take an image via your camera.

If you are logging a Job via a desktop device, a folder within your PC will open when you click **Choose File**, if you have the image on your PC you will be able to upload the image this way.

Videos and audio files cannot be uploaded to this system.

Finally, you need to type in your name into the **Requested By** field once all the required fields have been completed you can click **Save**.

Once your Job has been logged a message will appear similar to the below.



You have now logged a Job, click **ok** and you will be returned to the page below.

Click the **three lines**, which are on the top left of this screen and select **Dashboard**, this will return you to the home screen.

The screenshot shows the 'CREATE WORK ORDER' interface in the Accruent system. The header bar is blue with the 'accruent' logo on the left and a user profile icon on the right. Below the header, the title 'CREATE WORK ORDER' is displayed, followed by the instruction 'COMPLETE THE REQUIRED FIELDS TO RAISE A WORK ORDER FOR SERVICE'. The form contains the following fields and controls:

- Asset Tag:** A text input field with a 'Scan' button and a 'Search' button to its right.
- Building:** A dropdown menu with a search icon on the right.
- Category:** A dropdown menu.
- Subcategory:** A dropdown menu.
- Asset Type:** A dropdown menu.
- Location:** A dropdown menu.
- Problem Type:** A dropdown menu.
- Priority:** A dropdown menu.
- Problem Description:** A large text area.
- Upload Document:** A file upload field with a 'Choose File' button and the text 'No file chosen'.
- Requested By:** A text input field.

At the bottom of the form, there are 'Save' and 'Cancel' buttons. A blue arrow points from the text on the left to the three-line menu icon in the top left corner of the form.

My Watched Jobs

When you Log a Job, you may be shown that a similar job already exists on the system. If you are you will see a screen like below.

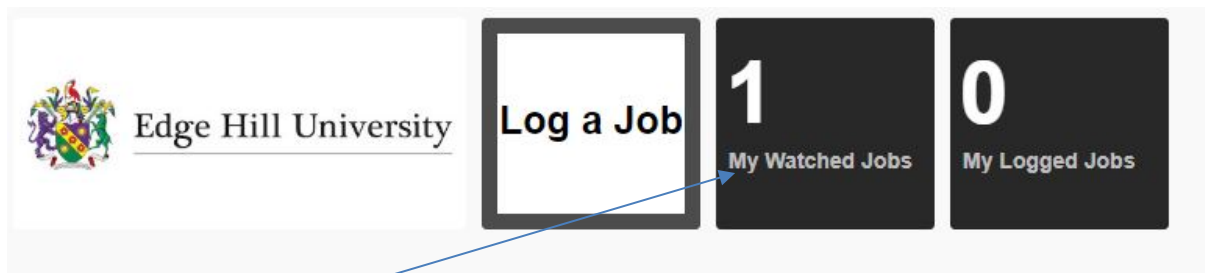
WO #	Created	Status	Contractor	Type	Problem Type	Space	Completed	Recall	Watching
57273417	01-Nov-2018	Assigned	EHU Property Services	Normal	Leaking			N/A	<input type="button" value="Watch"/>
57221724	29-Oct-2018	Service Complete	EHU Property Services	Normal	Damaged		29-Oct-2018 12:18	<input type="button" value="Yes"/>	<input type="button" value="Watch"/>
57221723	29-Oct-2018	Service Complete	EHU Property Services	Normal	Faulty		29-Oct-2018 12:27	<input type="button" value="Yes"/>	<input type="button" value="Stop"/>
57221715	29-Oct-2018	Service Incomplete	EHU Property Services	Normal	Failed			N/A	<input type="button" value="Watch"/>
57191808	24-Oct-2018	Assigned	EHU Property Services	Normal	Leaking			N/A	<input type="button" value="Watch"/>
57191807	24-Oct-2018	Assigned	EHU Property Services	Normal	Leaking			N/A	<input type="button" value="Watch"/>

You can see further details on any of these logged jobs by clicking the **blue** eight-digit number. If this is the same job as you are reporting, you can select to **Watch** this job. Selecting **Watch** will ensure you receive updates on this job as it progresses through to completion.

If you select to **Watch** a Job you DO NOT need to create a new work order. If you select **Watch** and then Create Work Order you will duplicate the job. Instead select **Watch** and then Cancel, this ensures you do not create a duplicate Job but will receive updates on any Job you are watching.

Once you press cancel you will be returned to the Log a Job screen from here click the **three lines**, which are on the top left of this screen and select **Dashboard**, this will return you to the Home screen.

Once you are Watching a job, on your Dashboard you will see in the My Watched Jobs Tile a number, this is the number of jobs you are currently watching.

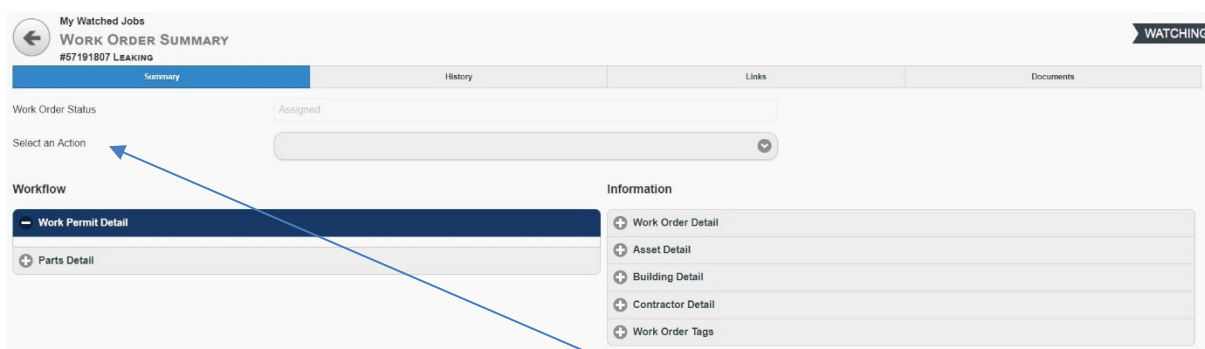


Select this tile.

You will be taken to a new screen which gives you an overview of the jobs you are watching and the status of the Job, a description and other relevant information like the below.

Work Order No.	Status	Tags	Building No.	Building Name	Building Type	Space	Space Type	Parent Organization	Location	Contractor	Problem Type	Priority	Date Created	Category	Sub Category	Asset Number
57191807	Assigned	1	SC	Sports Centre	Teaching Space SC			EHU HQ	Sport and Physical Activity	EHU Property Services	Leaking	P1 Emergency	24-Oct-2018 11:22	Mechanical	Gas Meter	0000045

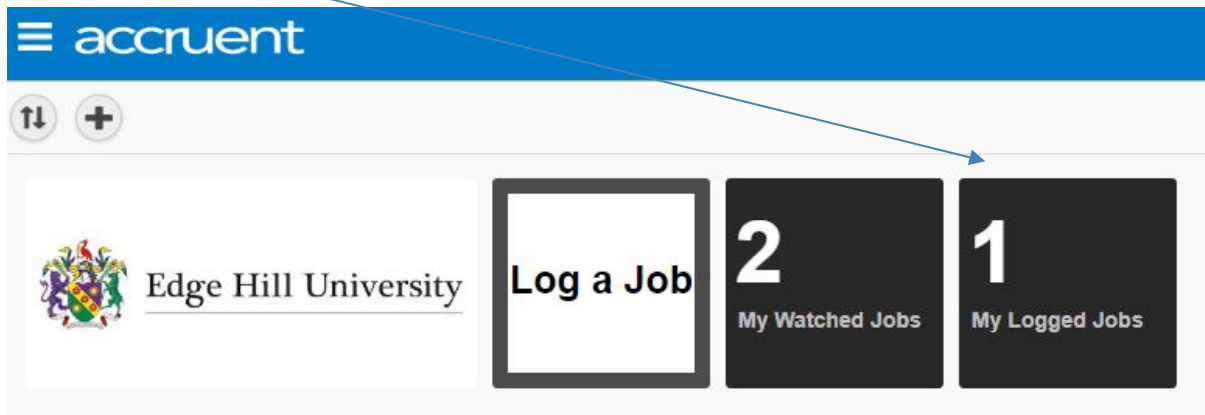
If you wish to stop watching a Job, click the **Job** and you'll see a screen like the below.



Select from the dropdown menu against **Select an Action** and click **Stop Watching Work Order**. Then click the **back arrow** and you will be returned to My Watched Jobs Dashboard.

My Logged Jobs

On the main dashboard you can check your logged jobs by selecting the **My Logged Jobs** Tile.



Once you click this tile you will be taken to a new screen which gives you an overview of the jobs you have logged and the status of the Job, a description and other relevant information like the below.

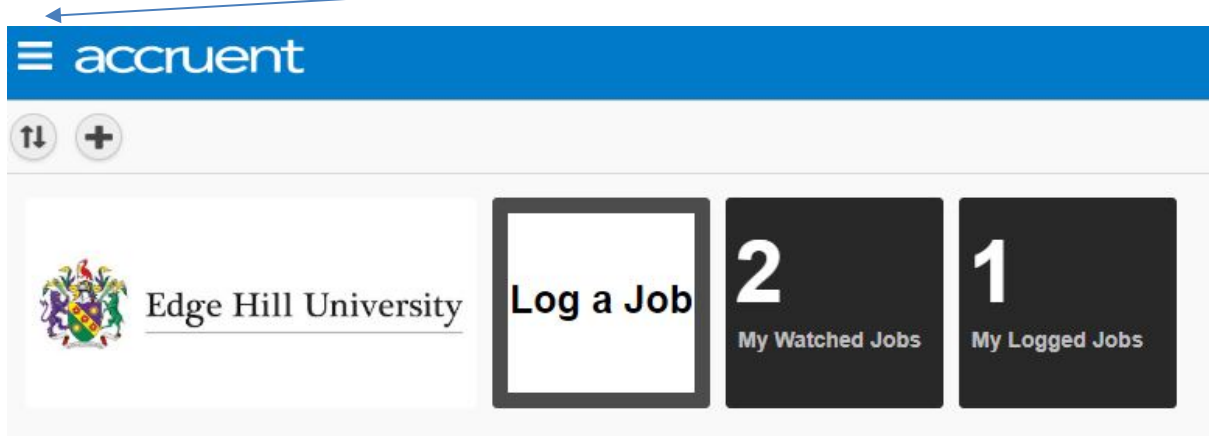
Work Order No.	Status	Tags	Building Name	Building Type	Location	Contractor	Problem Type	Priority	Date Created	Category	Sub Category	Asset Number	Reported By	Work Order Description	Engineer Comments	Problem Description
57277354	Assigned	0	Sports Centre	Teaching Space SC	Sport and Physical Activity	EHU Property Services	Damaged	P1 Emergency	02-Nov-2018 14:54	Mechanical	Gas Meter	0000045	Mark Miller			Has the item been damaged by a student? Nols there a smell of gas? UnknownIs there a Health and Safety Risk? No

Click the **Job** and you will be taken to a new screen where you can select more information under **Summary, History, Links, Documents**.

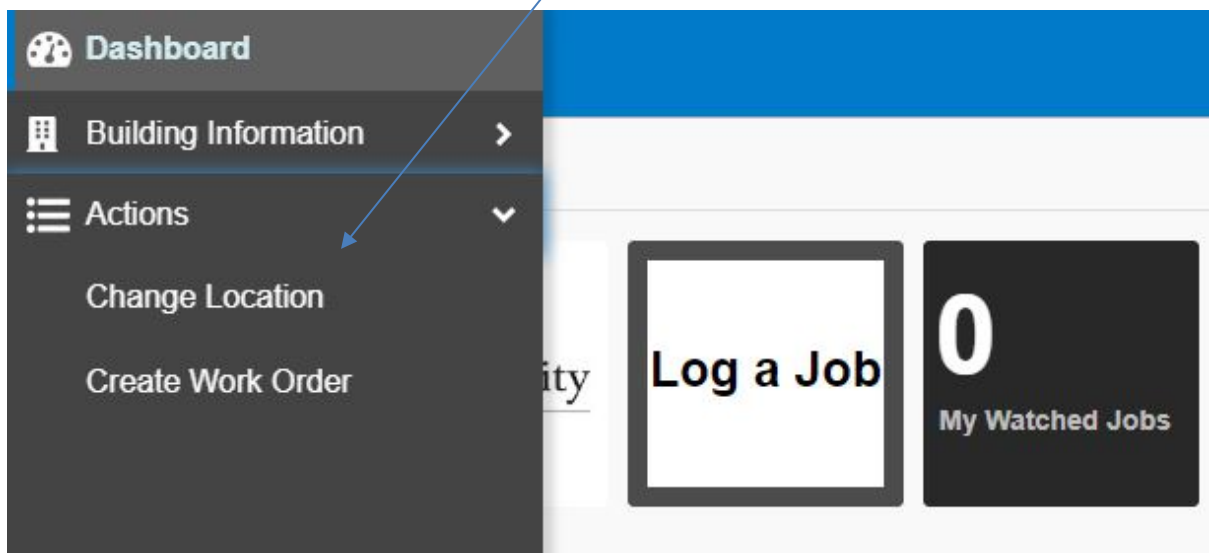
To return to the Dashboard click the **three lines** on the top left of the screen and select **Dashboard**.

Set Default Location

If you are in one building and will only be Logging a Job to that one building you may wish to default your location to that building, to do this on the main dashboard click the **three lines** situated at the top of the screen.



Select Actions from the drop-down list and select **Change Location**.



Select your building from the list.

Building No.	Building Name	Building Type	Parent Organization	Location	Distance
AC	The Arts Centre	Mixed Use AC	EHU HQ	Ormskirk, Lancashire	470.1 m
AIN	Aintree	Teaching Space AIN	EHU HQ	Ormskirk, Lancashire	10703.3 m
BEI	Back Halls - Eleanor Rathbone	Residential	EHU HQ	Ormskirk, Lancashire	588 m
BEm	Back Halls - EM Butterworth	Residential	EHU HQ	Ormskirk, Lancashire	576.5 m
BKa	Back Halls - Katherine Fletcher	Residential	EHU HQ	Ormskirk, Lancashire	558.9 m
BLa	Back Halls - Lady Openshaw	Residential	EHU HQ	Ormskirk, Lancashire	572 m
BMa	Back Halls - Margaret Bain	Residential	EHU HQ	Ormskirk, Lancashire	537.2 m
BS	Business School	Teaching Space BS	EHU HQ	Ormskirk, Lancashire	542.7 m
BSc	BioSciences	Teaching Space BSc	EHU HQ	Ormskirk, Lancashire	620.3 m
CBi	Chancellors Court - Binns	Residential	EHU HQ	Ormskirk, Lancashire	459.3 m

Once you click against your building, this will become your default location, when you next **Log a Job** your location will automatically be populated.

CREATE WORK ORDER
COMPLETE THE REQUIRED FIELDS TO RAISE A WORK ORDER FOR SERVICE

Asset Tag

Building



Defaulting your location, automatically applies a filter so you will only see jobs logged against that building.

To change your default location, go back to **Change Location** and click unfiltered this will remove the Building location from your **Log a Job** screen.

Building No.	Building Name	Building Type	Parent Organization	Location	Distance
AC	The Arts Centre	Mixed Use AC	EHU HQ	Ormskirk, Lancashire	470.1 m
AIN	Aintree	Teaching Space AIN	EHU HQ	Ormskirk, Lancashire	10703.3 m
BEI	Back Halls - Eleanor Rathbone	Residential	EHU HQ	Ormskirk, Lancashire	588 m
BEm	Back Halls - EM Butterworth	Residential	EHU HQ	Ormskirk, Lancashire	576.5 m
BKa	Back Halls - Katherine Fletcher	Residential	EHU HQ	Ormskirk, Lancashire	558.9 m
BLa	Back Halls - Lady Openshaw	Residential	EHU HQ	Ormskirk, Lancashire	572 m
BMa	Back Halls - Margaret Bain	Residential	EHU HQ	Ormskirk, Lancashire	537.2 m
BS	Business School	Teaching Space BS	EHU HQ	Ormskirk, Lancashire	542.7 m
BSc	BioSciences	Teaching Space BSc	EHU HQ	Ormskirk, Lancashire	620.3 m
CBi	Chancellors Court - Binns	Residential	EHU HQ	Ormskirk, Lancashire	459.3 m