

CBRE TIKS Assure

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Onboarding: Technician, Worker, Sub-Contractor

Introduction

All contractors (technicians, workers, and subcontractors) performing works can use this platform for various clients.

The Contractor Company's Administrator will invite all of their technicians, workers and subcontractors to CBRE TIKS Assure if integration to a Contractor Management System does not exist

Technicians, workers and subcontractors can then register in CBRE TIKS Assure and enter their competencies.

When a work order is raised by your Operations Centre, it is sent directly to the contractor company's Administrator Portal. The Vendor Administrator will allocate the job to a qualified registered technician/contractor worker. The job is accepted through the mobile app by the technician/contractor worker, who completes the job using the app. If a technician's qualifications are expired, they will not be able to be allocated the work by the Vendor Administrator until they have upload current qualifications.

Technician Invitation

You will receive an email inviting you to register in CBRE TIKS Assure from your Vendor Administrator. You will need to use a computer to register and click on the link in the email to complete your registration.

Technician Registration

If an integration to a (CMS) platform does not exists, a technician/contractor worker will be requested to

enter their name and competency information for the work they perform, along with the **issue date** or **expiry date** listed on the competency. Competencies include:

- licences
- qualifications
- certificates, e.g. white card (construction), first aid etc.
- checks, e.g. police check, working with children etc.
- any other records required by the client or by your trade

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Profile

Sam Marciano

sam+test@fiks.com.au

Technician

0421969482

Australia/Sydney

change password

confirm password

Vendors:

Vendor	Branch	Status
CMS ENGAU001 - CMS Engineering Pty Ltd		Approved

Competencies:

Active Competencies

Type	License No	Acquired At	Expires At	Country	Added At
Carpenter - Contractor Licence Carpentry - Contractor Licence	q3regqewerq	02/11/2020	26/11/2020	NSW, Australia	17/11/2020

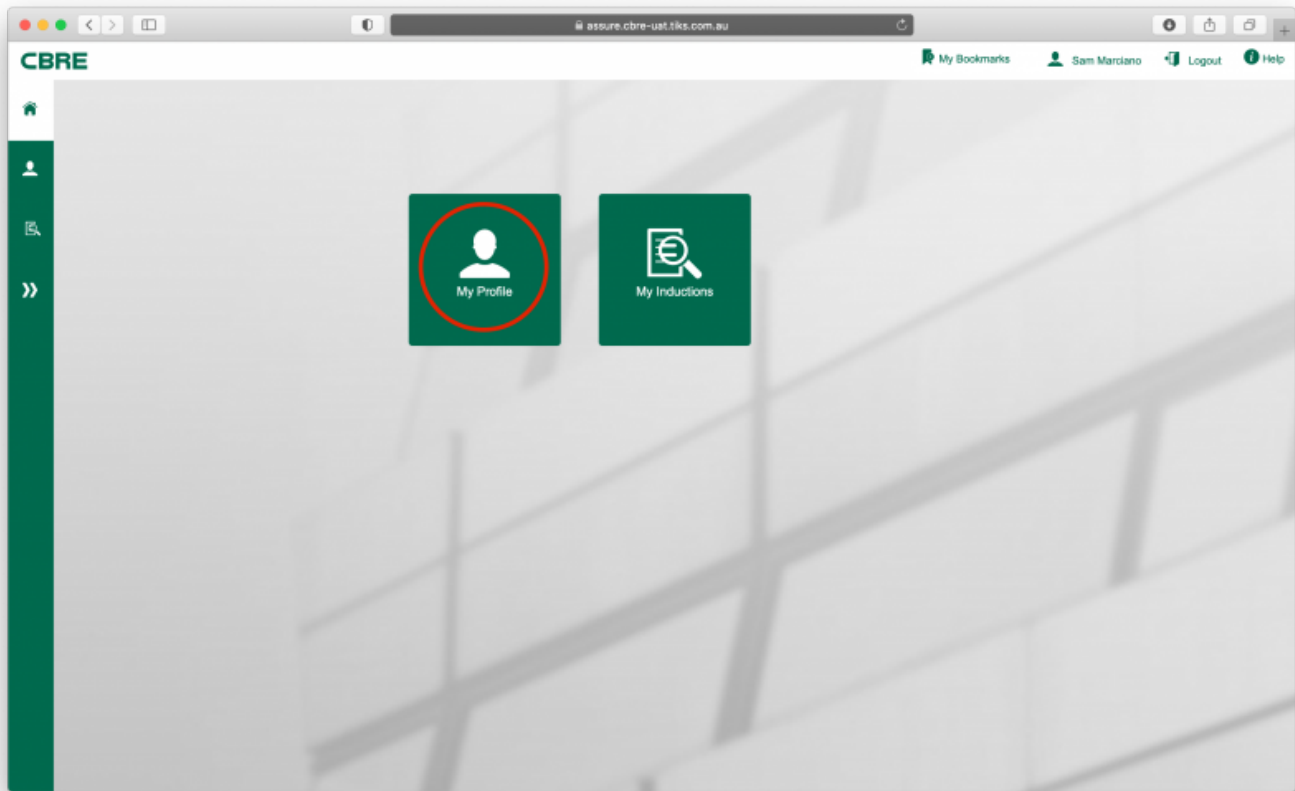
File/s

Once your competencies have been added, you will see them listed under 'Active Competencies'. Please ensure all relevant licences, certificates and qualifications are current and have been provided to your employer/contracting company - then click 'Register'.

Updating your Profile

To update your personal information and competencies, log on the Contractor Portal on a computer (you cannot access this via the app). Use the same log in detail that you use for the app to log into the portal. Click on the icon 'My Profile'. It is important to ensure your competencies are current or your

Vendor Administrator will not be able to assign you work.

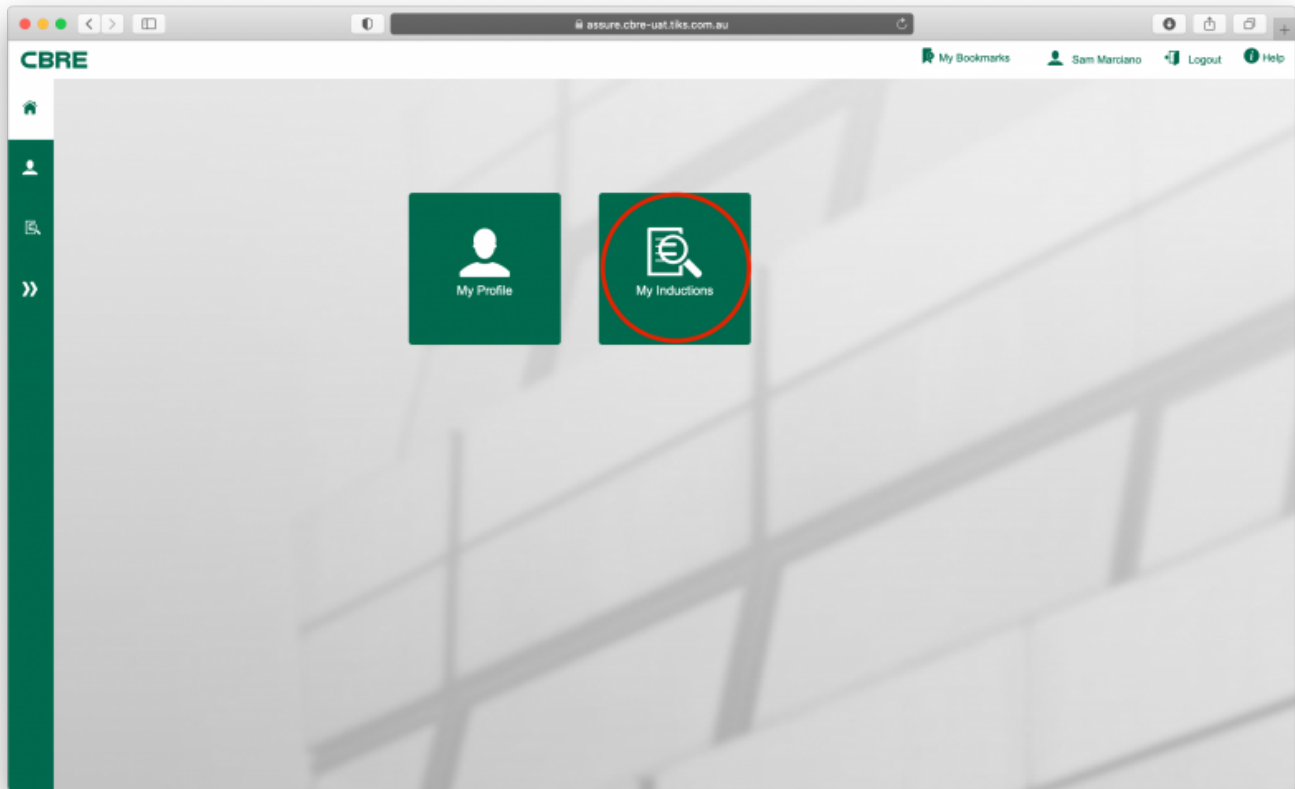


You can update:

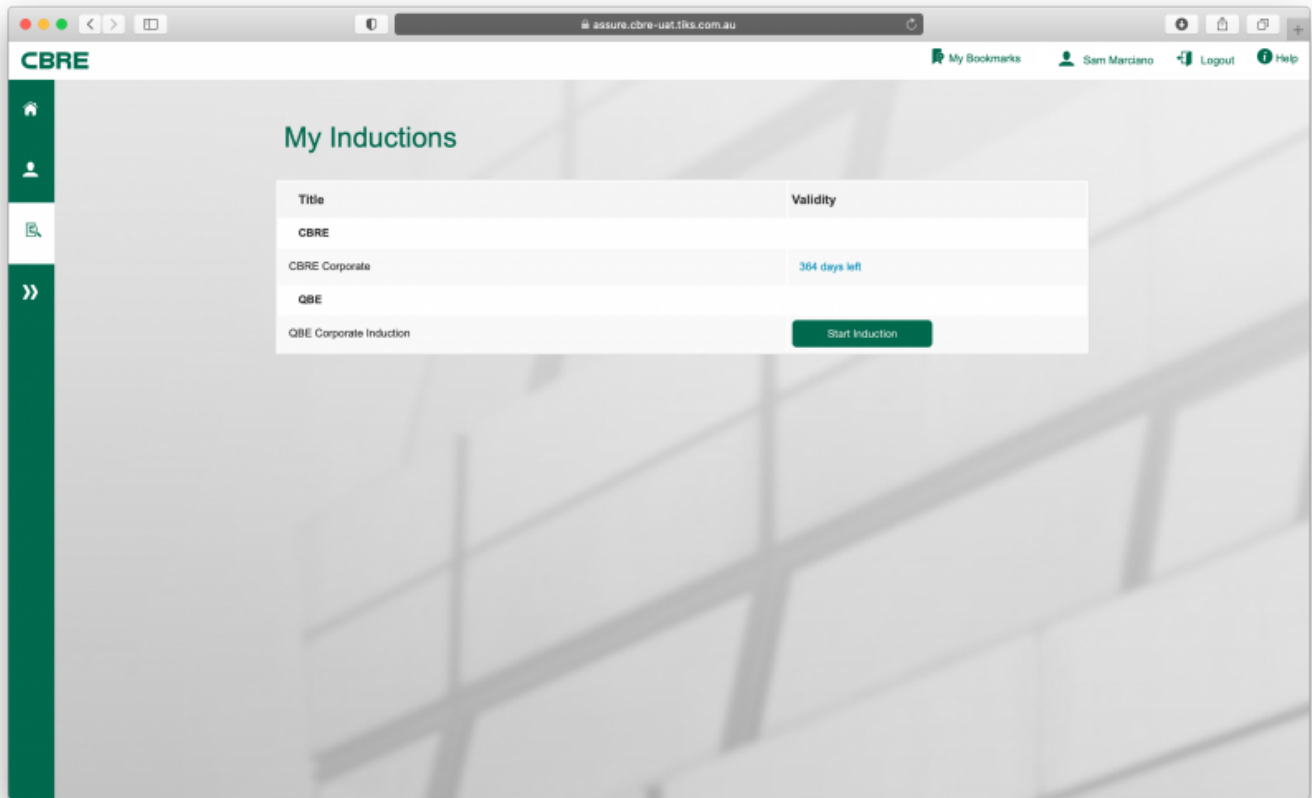
- Name
- Phone Number
- Password
- Competencies

Completing your inductions

To complete your induction, click on the icon 'My Induction' button to view any induction required.



In the My Induction list, you can complete any induction required by tapping on the "Start Induction" button.



Once you start an induction, the induction content will commence in a new pop-up window.



Once completed, the user can close the window and the induction validity status will update. **Please note: you may need to refresh the browser window to see this update.**

Vendor Administrator User Guide

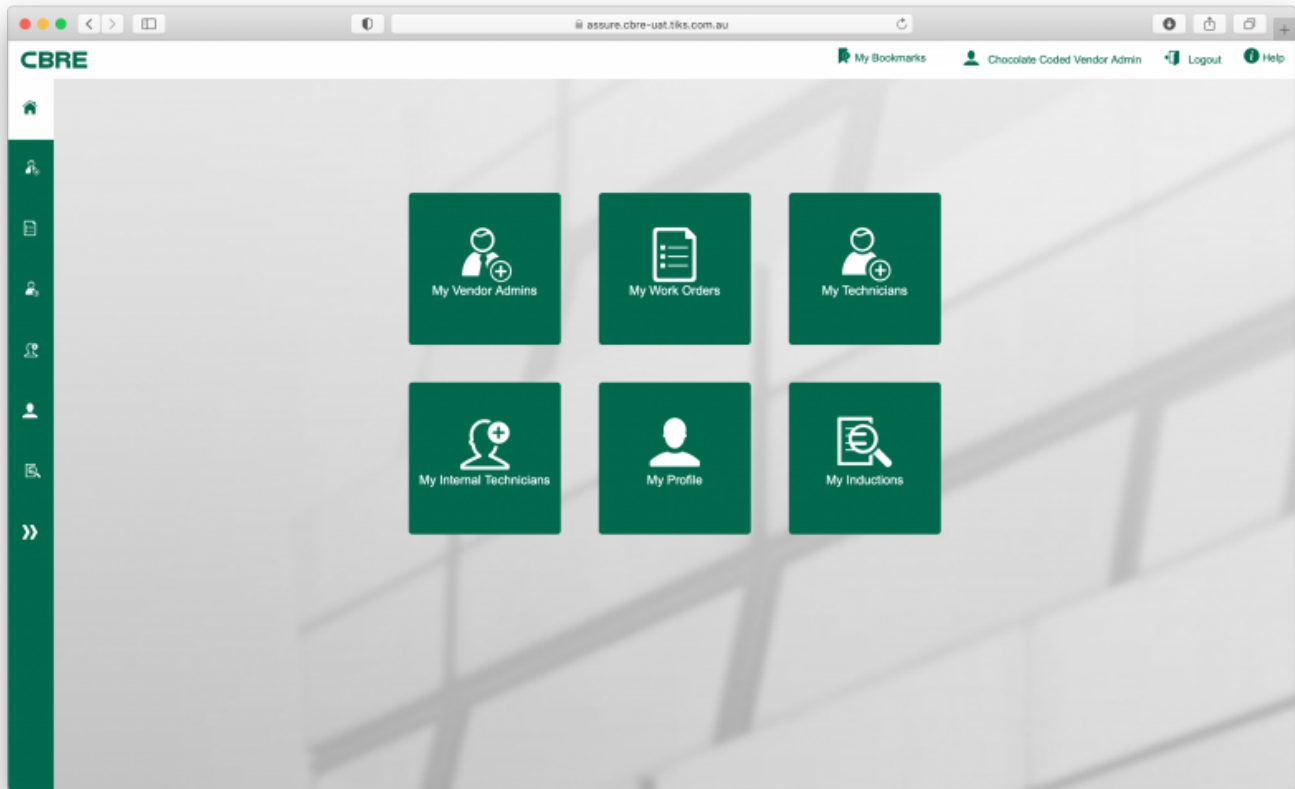
Introduction

The Contractor Company's Vendor Administrator will invite all their technicians, workers, and subcontractors to CBRE TIKS Assure. The technicians, workers and subcontractors then register in CBRE TIKS Assure and enter their competencies.

When the you raise a work order, it is sent directly to the contractor company's CBRE TIKS Assure Contractor Portal, which is managed by the Vendor Administrator. The Vendor Administrator will allocate the job to a qualified registered technician. The job is accepted through the app by the technician, who completes the job using the app. If a technician's qualifications are expired, they will not be able to be allocated the work by the Vendor Administrator until they upload current qualifications.

Overview Portal Navigation

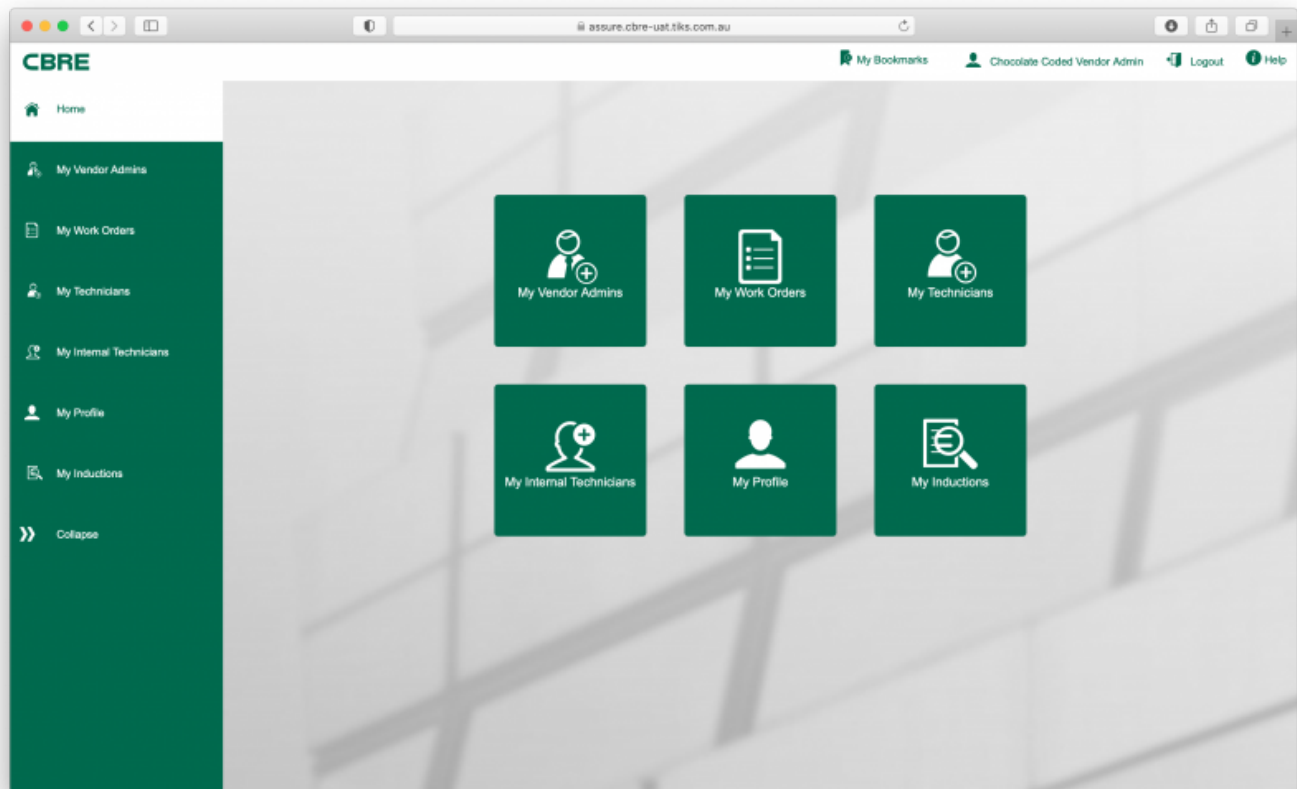
Once you have logged into the Portal, you will be presented with the main screen.



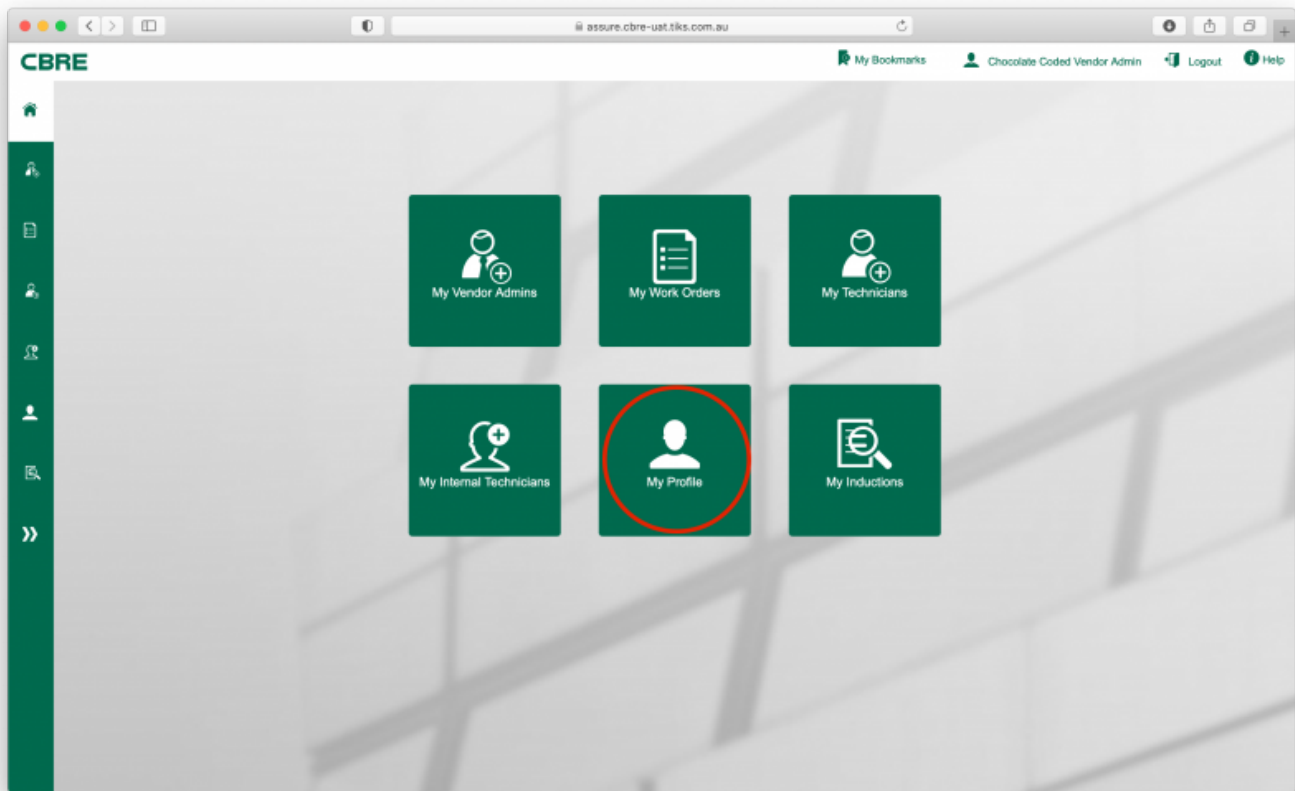
You will see the following tiles:

- **My Vendor Admins:** Where you can invite additional administrators
- **My Technicians/My External Technicians:** Where you can invite technicians, workers and subcontractors
- **My Work Orders:** where you can view, accept and assign work orders to technicians
- **My Induction:** where you can complete any outstanding inductions
- **My Profile:** Where you can update your personal profile

On the left hand side bar there are several icons that contain the same links as the main tiles. If you click on the double arrows, it will expand the selection to view each available link:

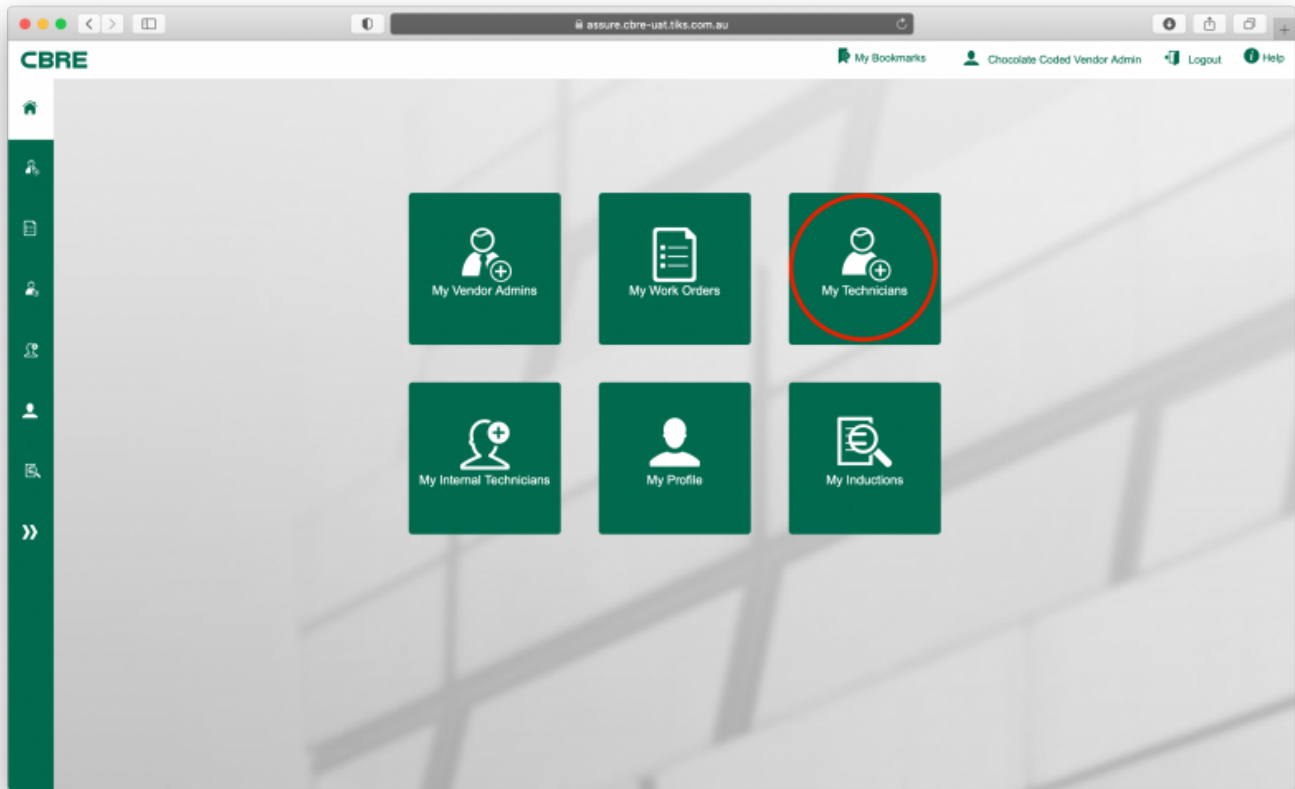


Updating your Profile

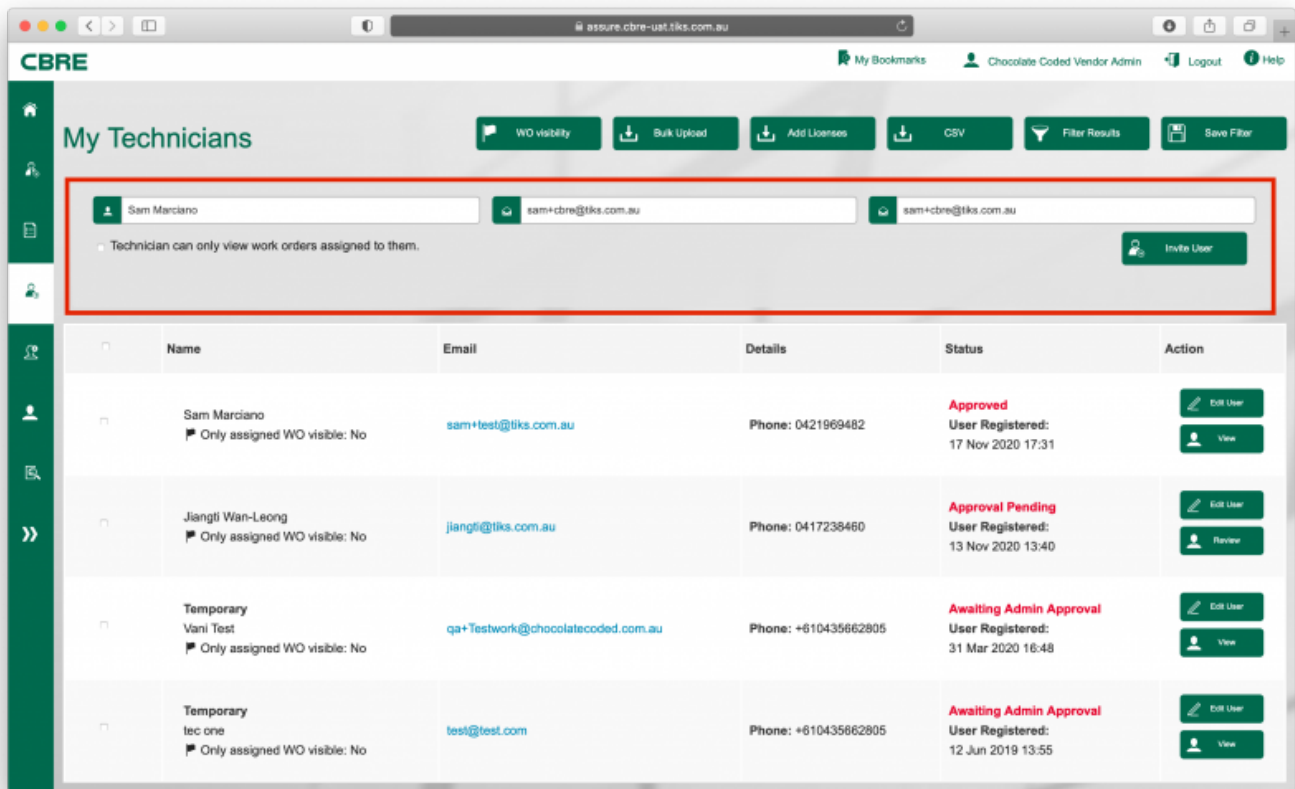


You can update:

- Name
- Phone Number
- Password
- Elect to work in CBRE TIKS Assure as a technician
- Add competencies



Next, complete the registration form. Once the registration is complete, the technician will receive an invitation email.



Review Competencies

Once a technician has uploaded their competencies, the vendor administrator reviews and approves them to enable the technicians to be allocated work. Click on the Review button next to the technician's name.

Notification of Updated Competencies

When a technician updates their competencies, you will receive a notification to alert you to review the new competency.

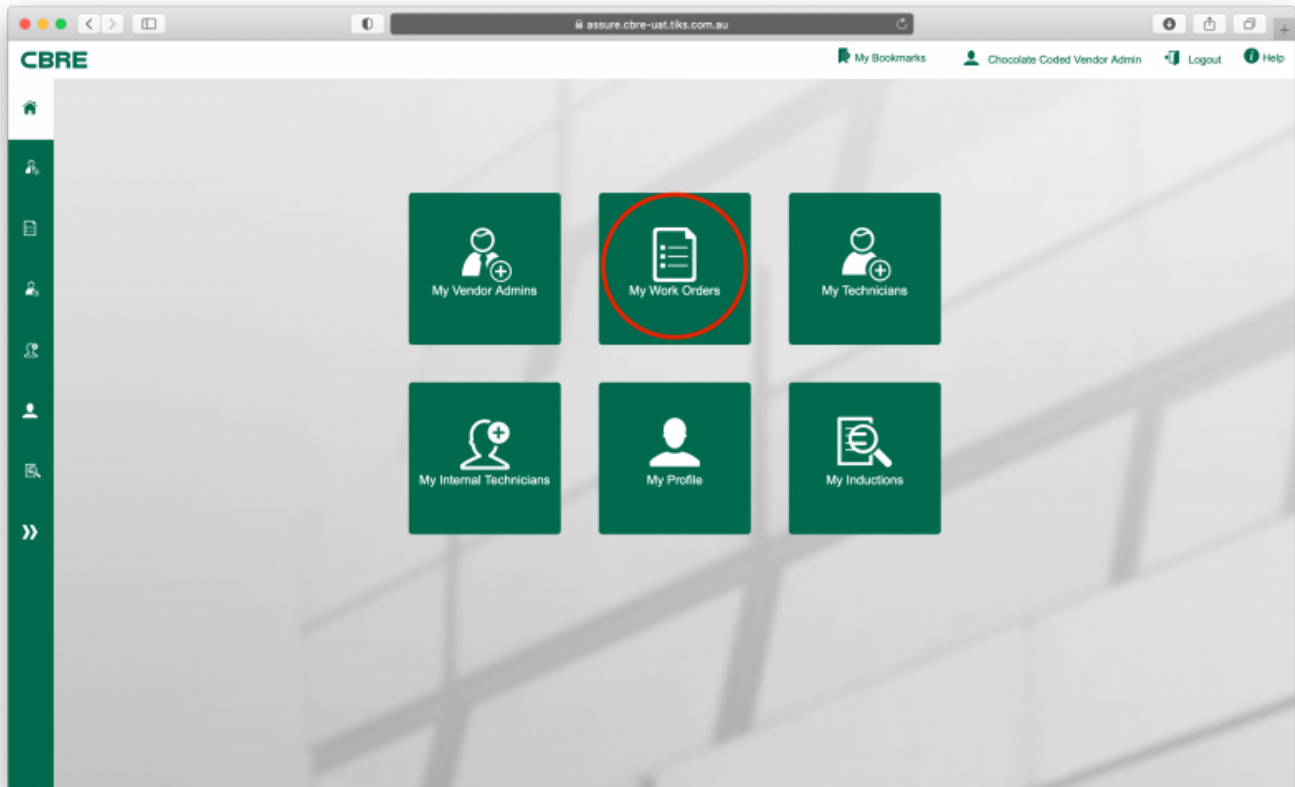
Approving Technician and Worker Competencies

Once a technician is registered and has uploaded their qualifications, the Vendor Administrator must

review and approve it to complete the technician's registration. Go to My Technicians to view technicians with Approval Pending

Manage Work Orders

To manage your work orders, click on the My Work Orders icon.



The Work Order screen main view:

ETA	Date Created	WO Number	WO Status	Client	Location	Location Address	Location State	WO Type (RMI/PM)	Vendor Branch	Site Contact Name	Site Contact Phone Number	Description	Service Type
No ETA presented	17/10/2018 12:49:01	3285603	WO UNASSIGNED	ChocolateCompany 1	Perth Head Office,	Perth Head Office Wellington Street Perth, WA 6000 AUSTRALIA	WA Perth, 6000	Reactive Maintenance	ABC Engineering Pty Ltd	Peter	1231	Lorem ipsum is simply dummy text of the printing and typesetting industry...	Alarm Trigg - NOI
31/10/2020 13:27 AEST	17/10/2018 12:49:30	3285604	PRA STARTED	ChocolateCompany 1	Perth Head Office,	Perth Head Office Wellington Street Perth, WA 6000 AUSTRALIA	WA Perth, 6000	Reactive Maintenance	ABC Engineering Pty Ltd	Peter	2343	Lorem ipsum is simply dummy text of the printing and typesetting industry...	Alarm Trigg - NOI

Assign a Work Order to a Technician

Once a work order is accepted you can assign the work order to a technician. Only registered technicians or workers with up to date competencies can be allocated a work order. To assign a work order, select the work order:

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Work Order Details

Work order Number: 3285604
Priority: P1
WO Status: PRA STARTED
TIKS Status: Issued - PRA Pending
Region: WESTPOWOU-WA

Client: ChocolateCompany 1
Service Type: Alarm Trigger - NOR
Work Order Type: Reactive Maintenance
Client Ref: 00003

Site Name: Perth Head Office
Address: Perth Head Office Wellington Street Perth, WA 6000 AUSTRALIA
City/Postcode: Perth, 6000
GPS Coordinates: -33.9545037,116.1258799
Client Site Id: Perth Head Office Wellington Street Perth, WA 6000 AUSTRALIA

Vendor: CMSENGAU001
Vendor Branch: ABC Engineering Pty Ltd

Issue Description: Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

Expected Rectification: -
Extended to: -

Site Contact: Peter

Acceptance
Tech Status: Accepted
ETA: 31/10/2020 13:27 AEDT

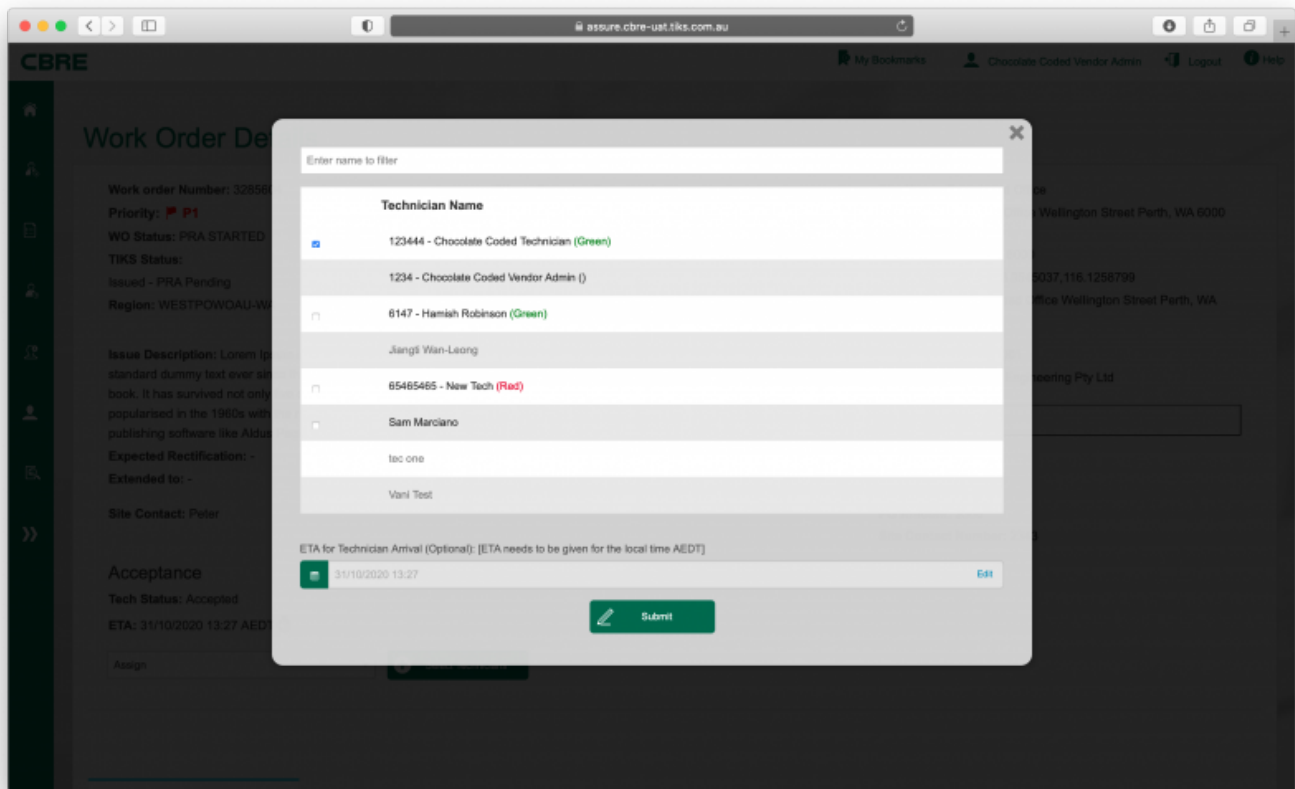
Select Action

Essential Site Information

PO Amount: \$500
Site Contact Number: 2343

Work Order Completion Documents

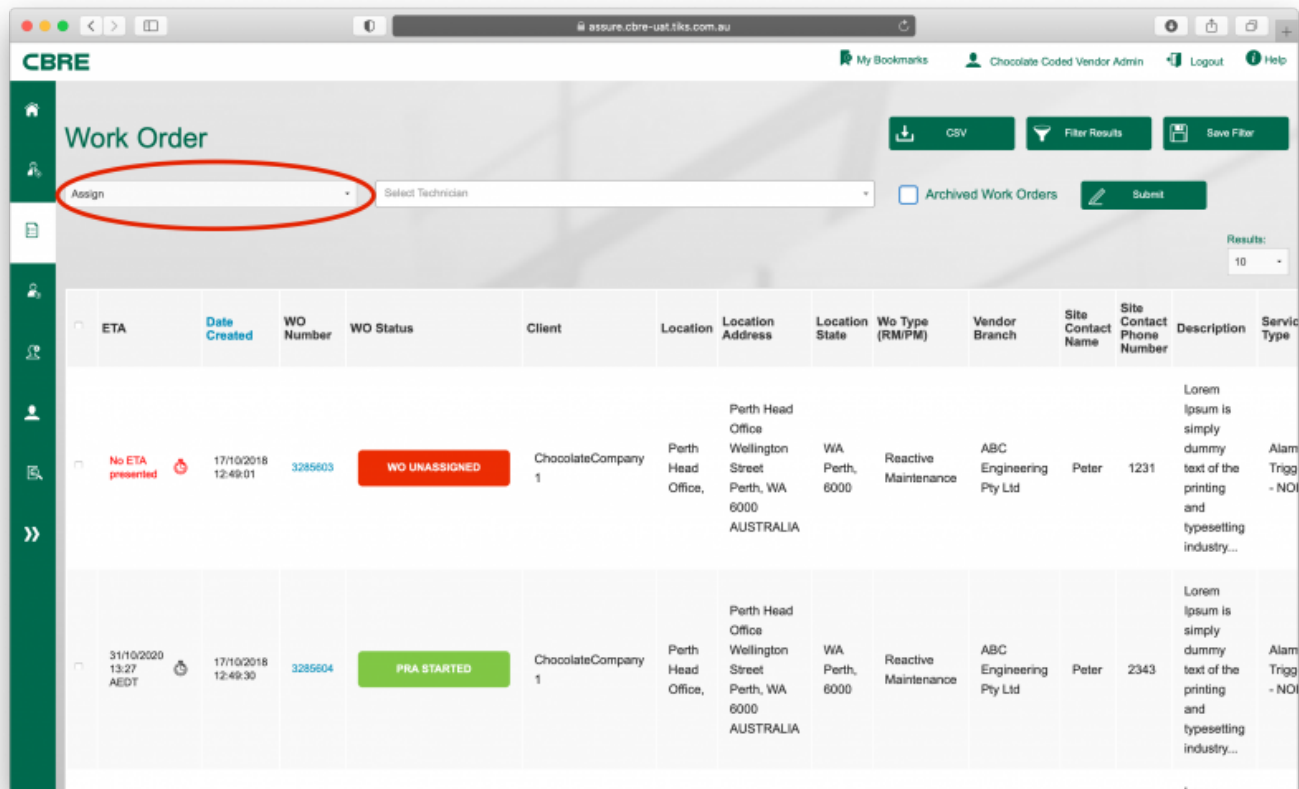
When you select Assign, a new button will appear to Select Technicians. Click to select the technician to assign to the job.



If you need to use a technician with an expired competency, they can update their details in real time, so you can approve their changes and allocate a work order immediately. Select the technician and click Submit to assign it to them. Once you have assigned a work order to a technician, it will appear on their app under My Work Orders.

Bulk Assigning Work Orders to Technicians

You can bulk assign a work order by Filtering by a client and selecting the work orders you would like to assign to one technician. You can assign a work to more than one registered technician by selecting the same work order and adding additional technicians.



Reassign a Work Order/Remove Technician from Work Order

If a technician cannot complete a work order, reassign it at any time by clicking on the work order to access the Work Order Details page. The technicians assigned to the Work Order will appear underneath Technician Details. To remove a technician, click on the bin icon next to their name

Add Additional Technicians to an Open Work Order

To add additional technicians at any stage of a work order, follow the instructions in *Assign a Work Order to a Technician*

Decline a Work Order

If you decline a work order, the response will be automatically sent to the Operations Centre to reallocate the work order to another Vendor. You can decline a work order by following the same steps as in Assign a Work Order, except choose Decline. You will need to select a reason to decline a work order.

The screenshot shows the CBRE Work Order management interface. At the top, there's a navigation bar with 'Work Order' and buttons for 'CSV', 'Filter Results', and 'Save Filter'. Below this, there's a 'Decline' dropdown menu with a 'Please select' option highlighted. A 'Decline comment' text box is next to it. The main table lists work orders with columns: ETA, Date Created, WO Number, WO Status, Client, Location, Location Address, Location State, Wo Type (RM/PM), Vendor Branch, Site Contact Name, Site Contact Phone Number, Description, and Service Type. Two work orders are visible: one with status 'WO UNASSIGNED' and another with status 'PRA STARTED'.

ETA	Date Created	WO Number	WO Status	Client	Location	Location Address	Location State	Wo Type (RM/PM)	Vendor Branch	Site Contact Name	Site Contact Phone Number	Description	Service Type
No ETA presented	17/10/2018 12:49:01	3285603	WO UNASSIGNED	ChocolateCompany 1	Perth Head Office,	Perth Head Office Wellington Street Perth, WA 6000 AUSTRALIA	WA Perth, 6000	Reactive Maintenance	ABC Engineering Pty Ltd	Peter	1231	Lorem ipsum is simply dummy text of the printing and typesetting industry...	Alarm Trigg - NOI
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Once you have selected the reason for declining a work order, a comment box will populate to allow you to advise in detail why the works have been declined.

Work Order History

The work order history can be viewed in the detailed view of the work order. Click on the work order number. On the bottom right you can track its history including pre-start risk assessment and Permit submission.

When a work order is live, this field will be populated like the below example:

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Work Orders

Technicians

Permits

Change History

Filter Results

Technician Details

Leader	Name	Phone	Action
	123444 - Chocolate Coded Technician	+610435662805	

PRA & Permits

Form Title	Submitted At	Form Type
No PRA or Permit		

PRA Approve/Declined

No PRA Records currently

Change History

User	Date Time	Activity
Chocolate Coded Vendor Admin	29/10/2020 14:28	WO ASSIGNED - Assigned technician Chocolate Coded Technician - qa+tech@chocolatecoded.com.au
Chocolate Coded Technician	29/10/2020 14:28	WORKER MANAGEMENT - Compliant (Green)
Chocolate Coded Technician	30/10/2020 13:27	WO ACCEPTED - Work order 3285604 is now accepted by Chocolate Coded Technician as Technician
Chocolate Coded Technician	30/10/2020 13:27	PRA STARTED - Start Work
Chocolate Coded Technician	30/10/2020 13:27	WORKER MANAGEMENT - Compliant (Green)
Chocolate Coded Technician	30/10/2020 13:27	PRA STARTED - PRA Pending
Chocolate Coded Technician	30/10/2020 13:56	PRA STARTED - Start Work
Chocolate Coded Technician	30/10/2020 13:56	WORKER MANAGEMENT - Compliant (Green)

Using Filter Search

Filter Results allows you to find specific work orders, when you have chosen the categories to filter, click on Filter in the bottom left hand corner to filter to the results page.

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WO Status

Select Status

Work Order Number

Location Address

Work Order Type

Select Work Order Type

Site Contact Name

Site Contact Phone

Service Type

Start Date Created

Start Date Onsite

Start Date Completion

Assignment Status

Select Assignment Status

Priority

Acceptance Status

Select Acceptance Status

Client

Select a client

Location

Location State

Select a State

Vendor Branch

Select a branch

Description

Status

End Date Created

STRALIA

End Date Onsite

End Date Completion

Assigned To

Perth, WA, 6000, Maintenance, Pfy Ltd

Region

filter

clear

close