

Vendor Administrator User Guide

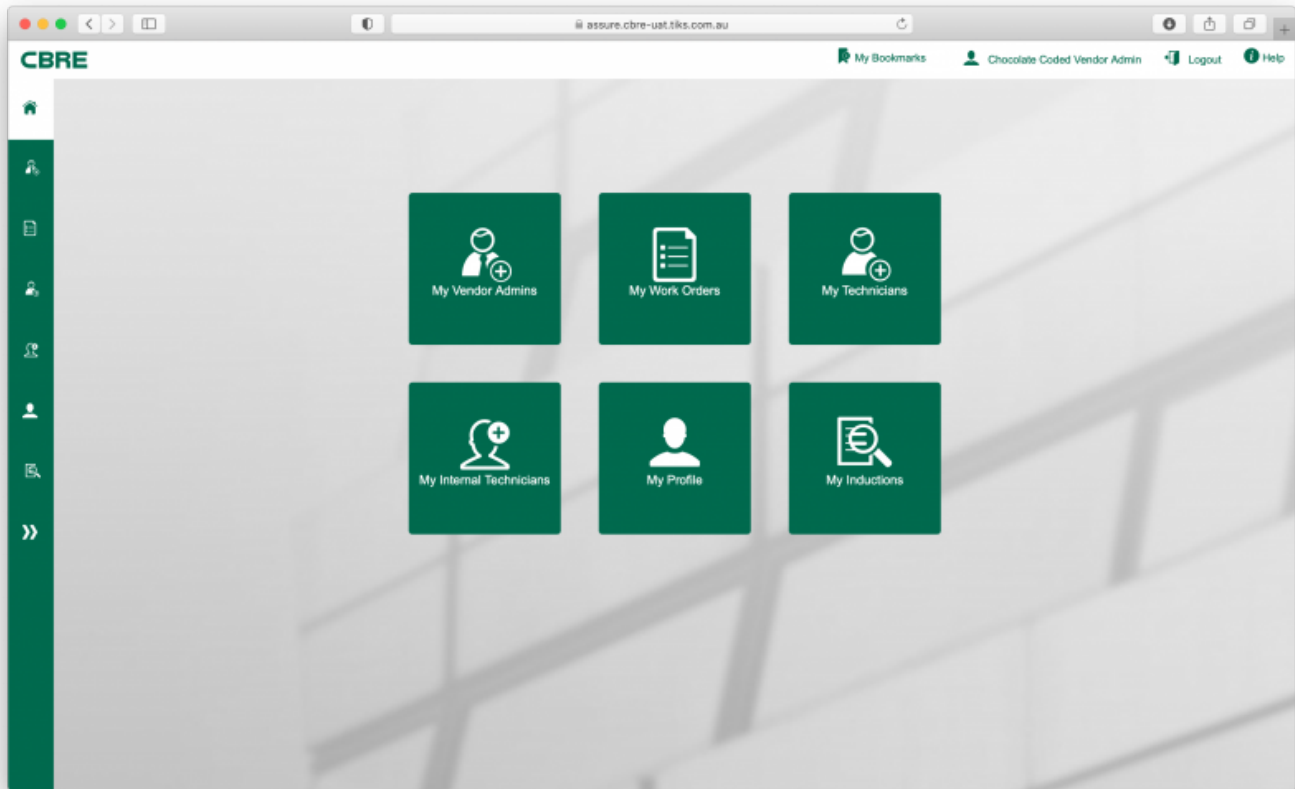
Introduction

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

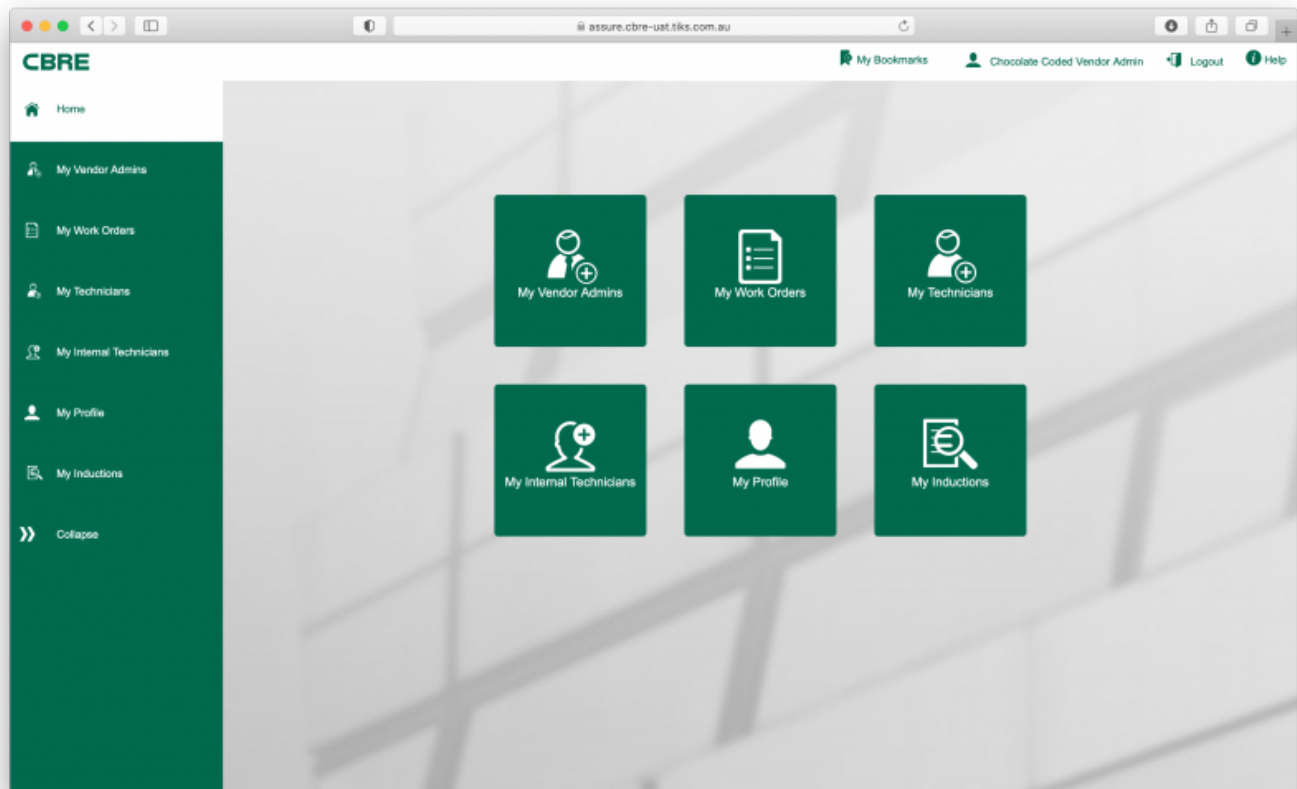
Once you have logged into the Portal, you will be presented with the main screen.



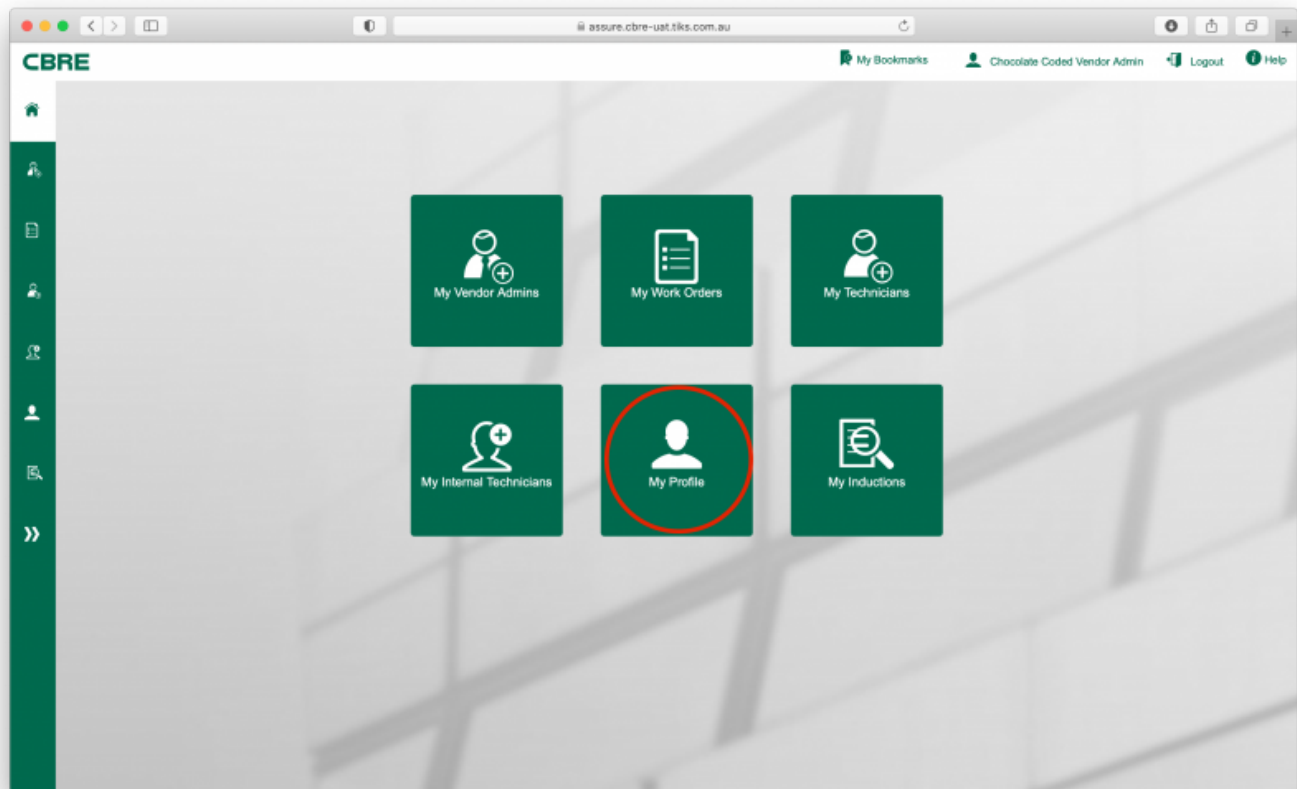
You will see the following tiles:

- **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:

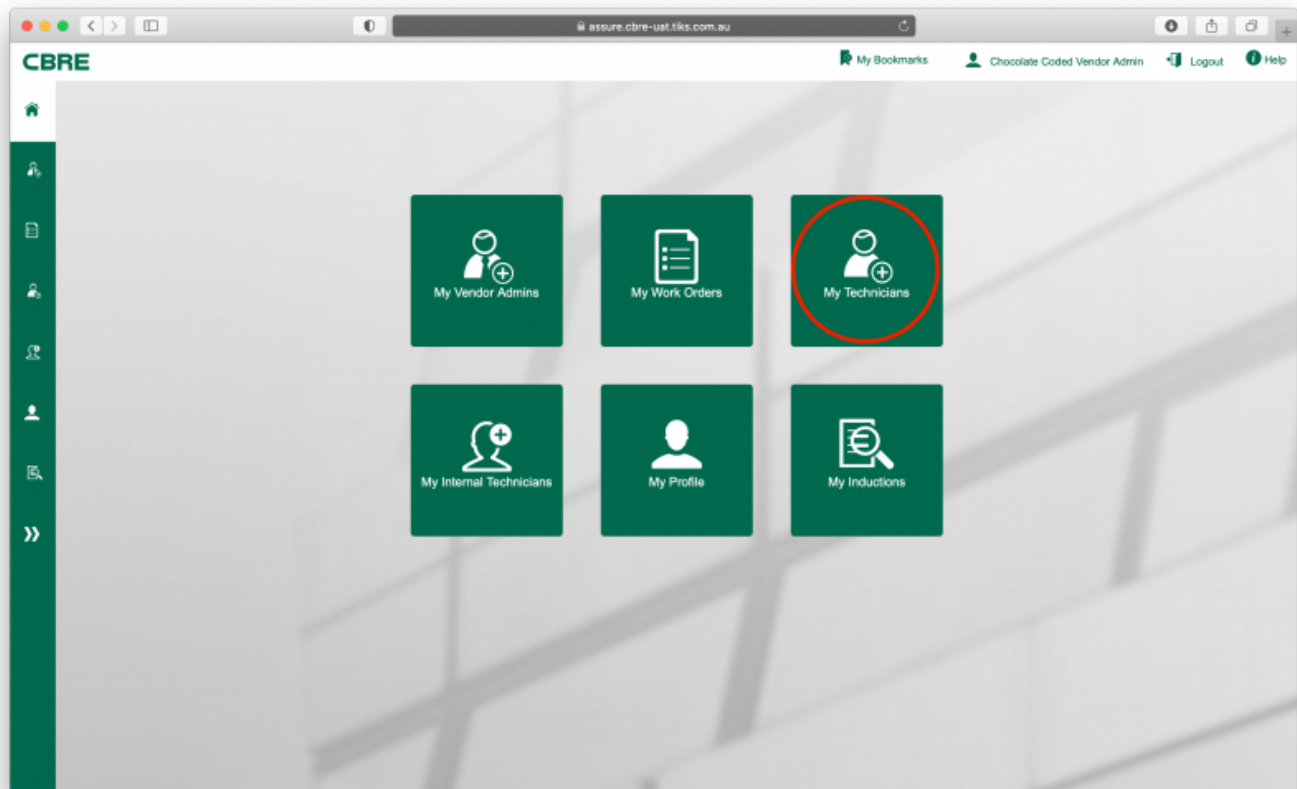


Updating your Profile

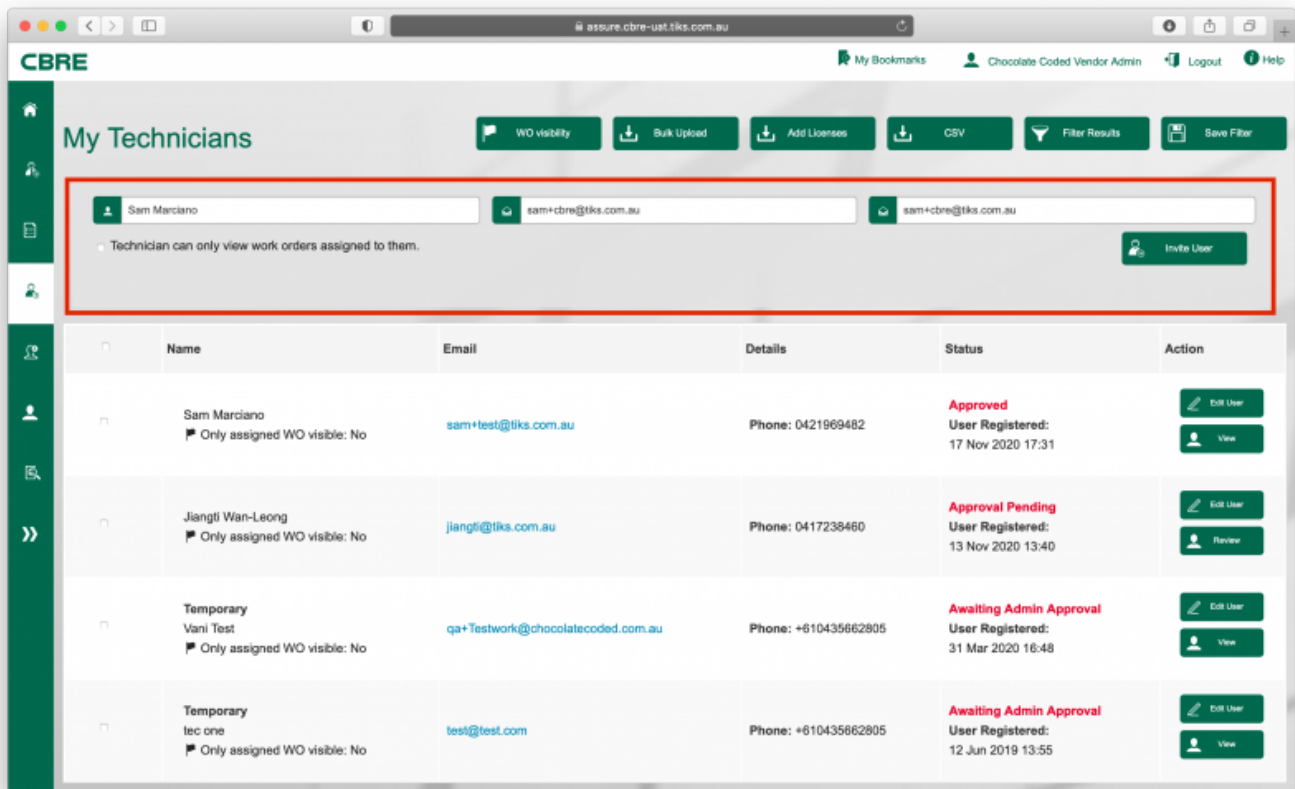


You can update:

- 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

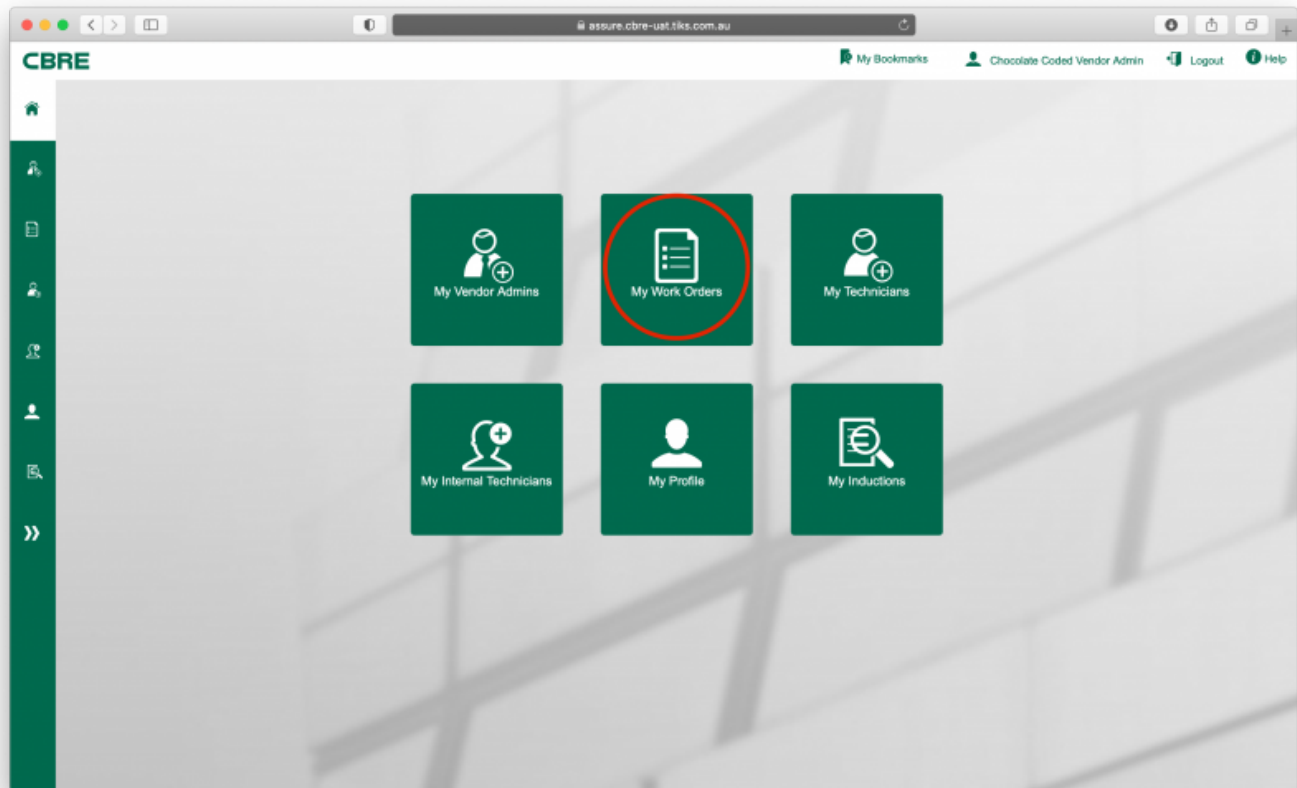
When a technician updates their competencies, you will receive a notification to alert you to review the new competency.

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:

Work Order

Select Action ☐ Archived Work Orders

Results: 10

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
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: WESTPOWOAU-WA

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

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

Essential Site Information

PO Amount: \$500

Site Contact Number: 2343

Work Order

Completion Documents

Click on Select Action and from the dropdown, select to Assign or Decline a work order.

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Client: ChocolateCompany 1

Service Type: Alarm Trigger - NOR

Work Order Type: Reactive Maintenance

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Client Site Id:Perth Head Office Wellington Street Perth, WA 6000 AUSTRALIA

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Vendor Branch: ABC Engineering Pty Ltd

Essential Site Information

PO Amount: \$500

Site Contact Number: 2343

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Expected Rectification: -

Extended to: -

Site Contact: Peter

Acceptance

Tech Status: Accepted

ETA: 31/10/2020 13:27 AEDT

Select Action

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.

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Site Contact: Peter

Acceptance

Tech Status: Accepted

ETA: 31/10/2020 13:27 AEDT

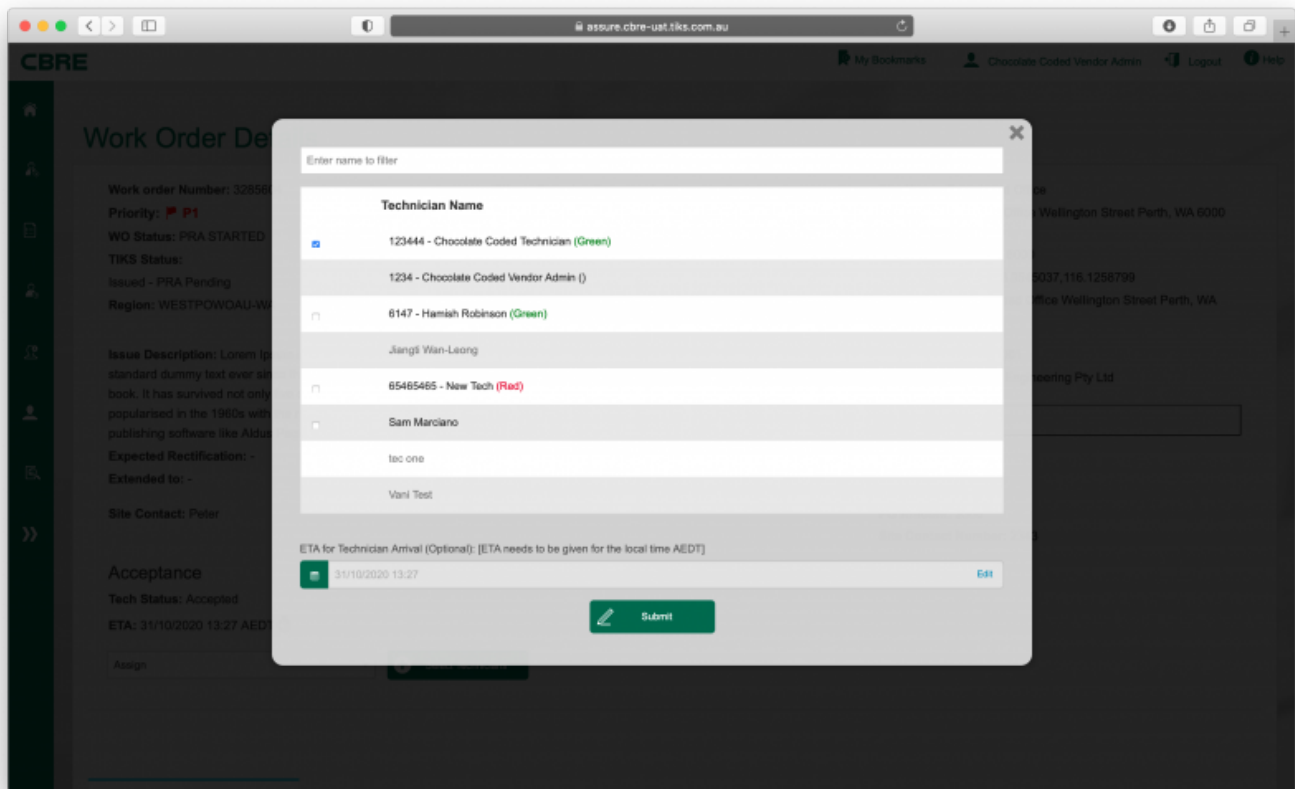
Assign

Select Technicians

Work Order

Completion Documents

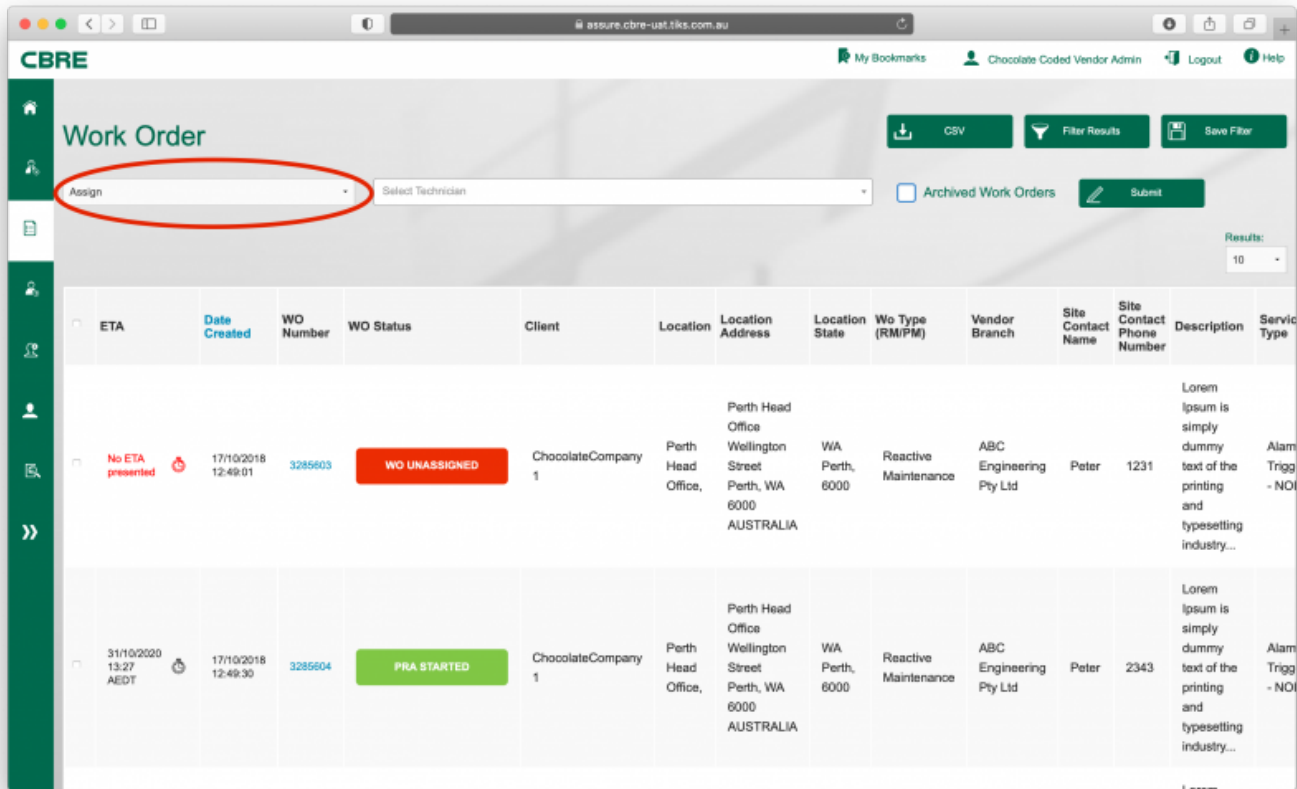
A full list of your technicians will appear:



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 displays the CBRE Work Order management interface. At the top, there's a navigation bar with the CBRE logo and user information. The main section is titled 'Work Order' and includes a 'Decline' dropdown menu. The dropdown menu is open, showing three options: 'Decline Reason 2', 'Decline Reason 3', and 'Decline Reason 1'. Below the menu is a 'Submit' button. To the right of the dropdown is a 'Decline comment' text box. Below these elements is a table of work orders. The table has columns for 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. The first row shows a work order with status 'WO UNASSIGNED' and a 'No ETA presented' warning. The second row shows a work order 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
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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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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 3255604 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

End Date Onsite

End Date Completion

Assigned To

Select Vendor/Technician

Region

Perth Head Office

filter

clear

close

Revision #5

Created 4 years ago by [Sam Marciano](#)

Updated 3 years ago by [Robert Milagre](#)