# 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.
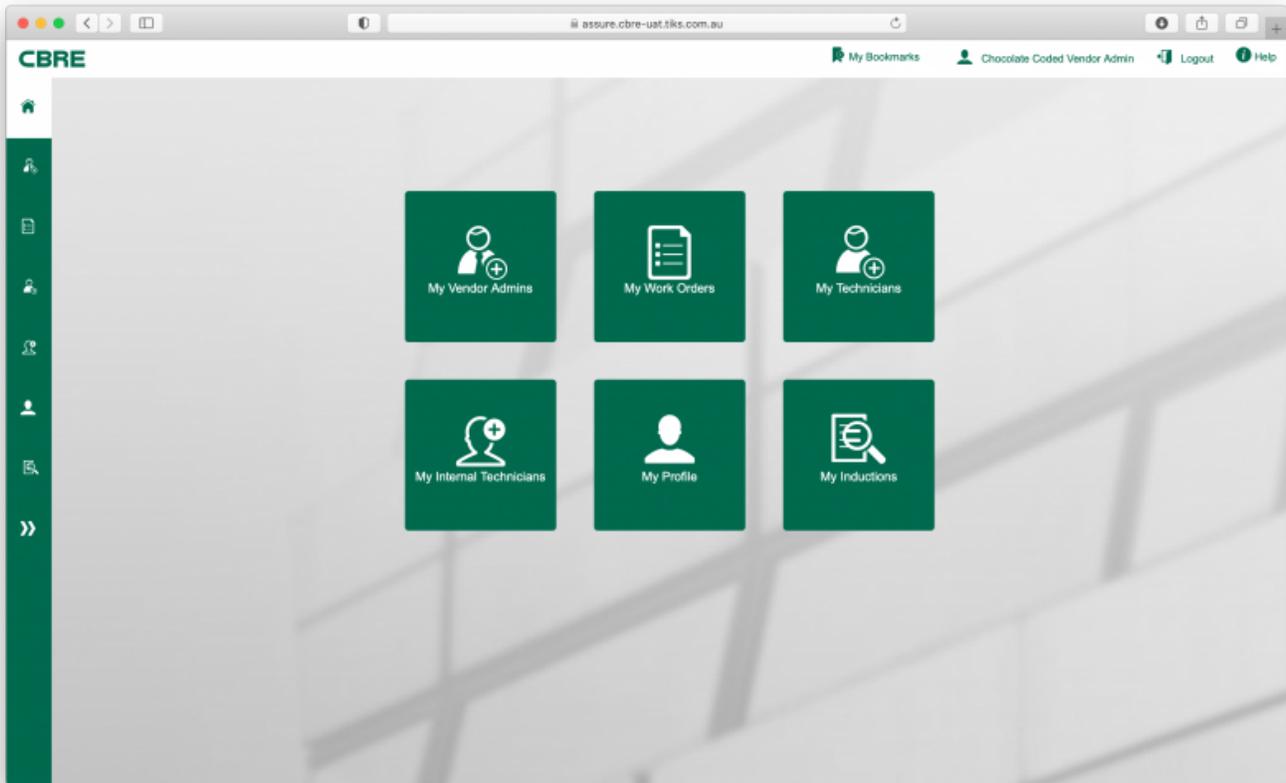
You will see the following tiles:

- **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:
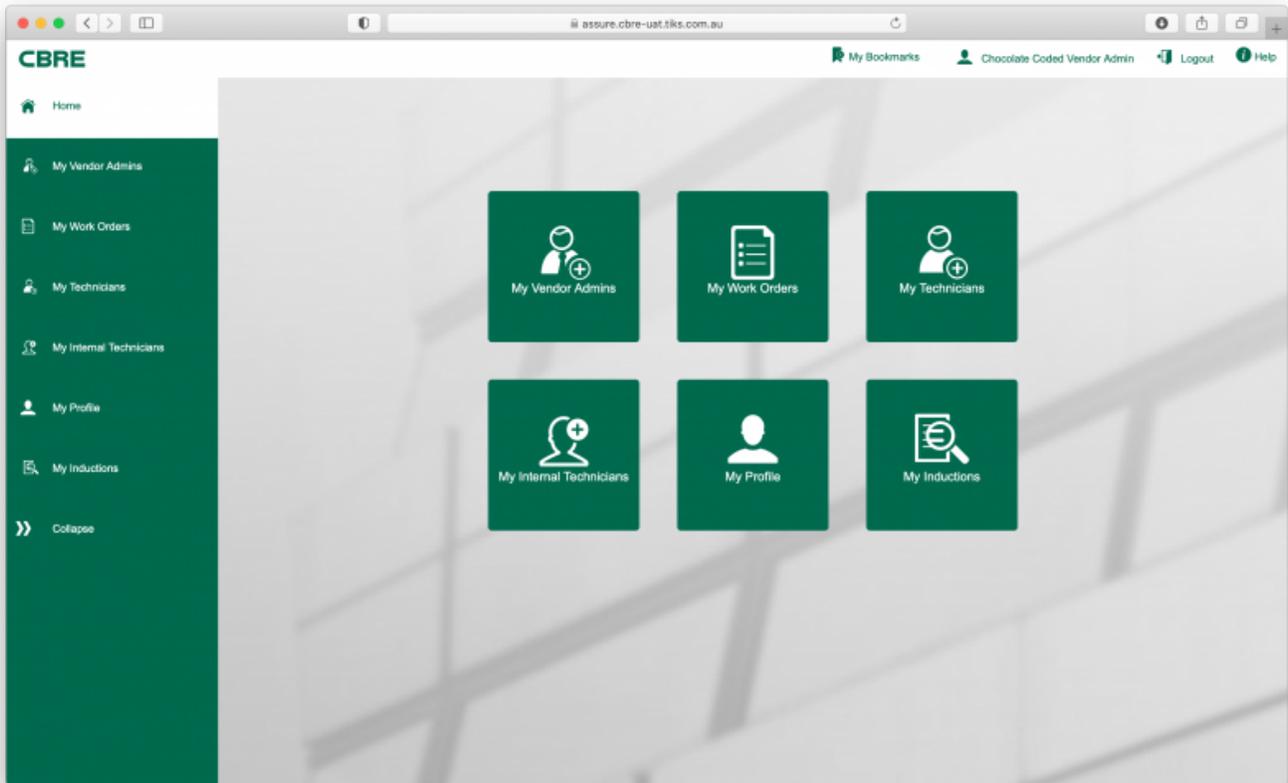
Updating your Profile
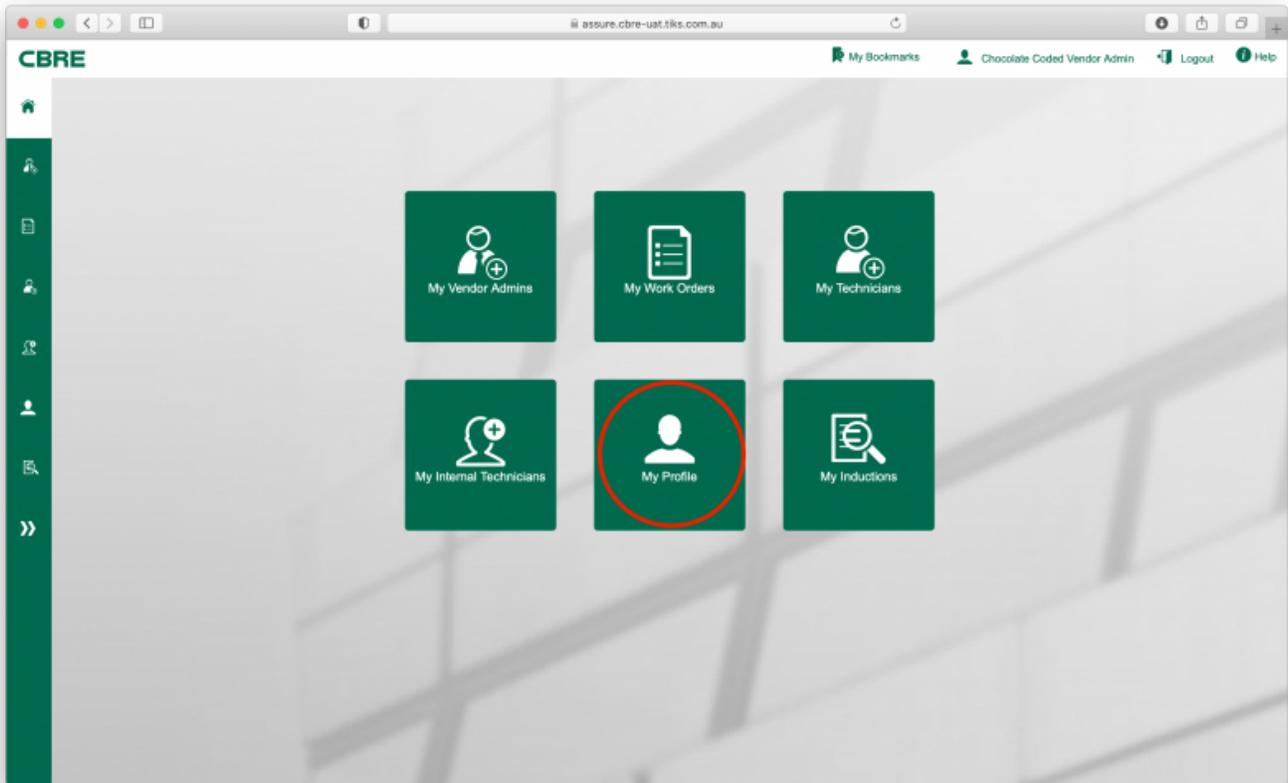
You can update:

- Name
- Phone Number
- Password
- Elect to work in CBRE TIKS Assure as a technician
- Add competencies
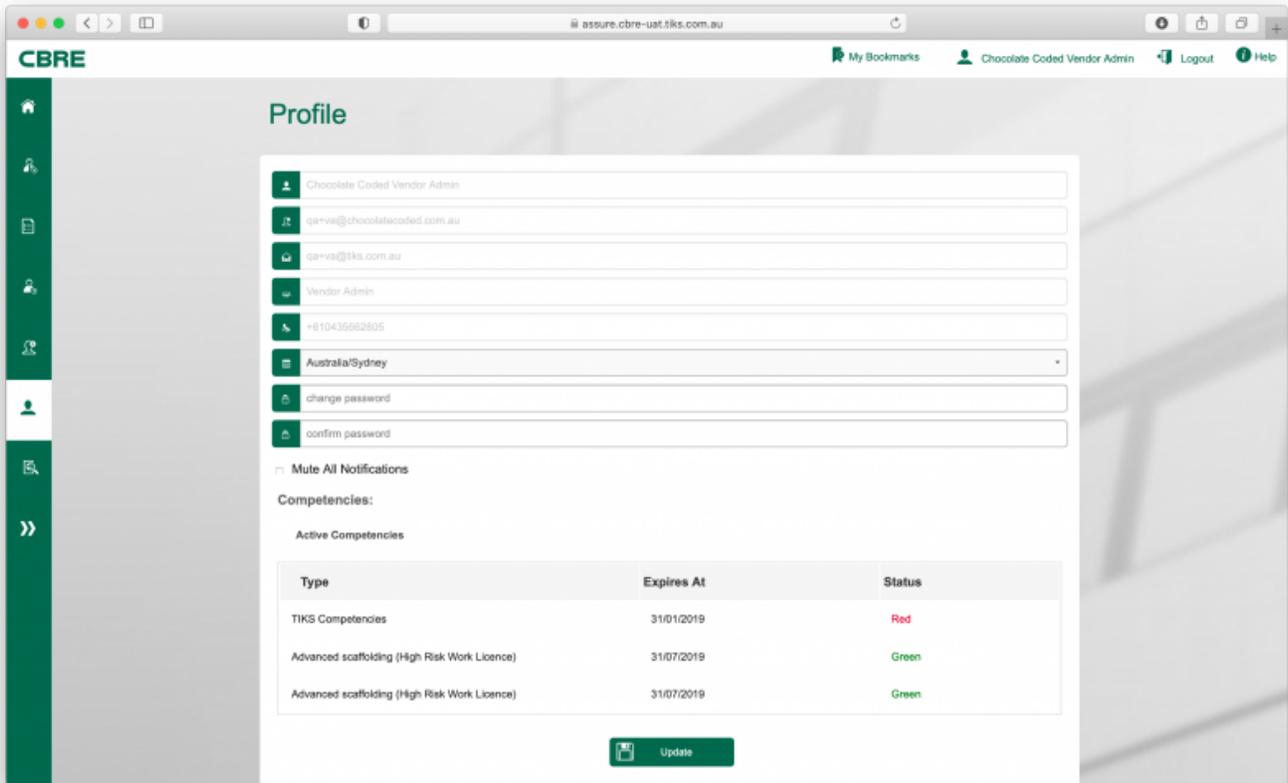
# Invite Technicians and Workers

To invite all your technicians and workers to CBRE TIKS Assure, click on My Technicians.
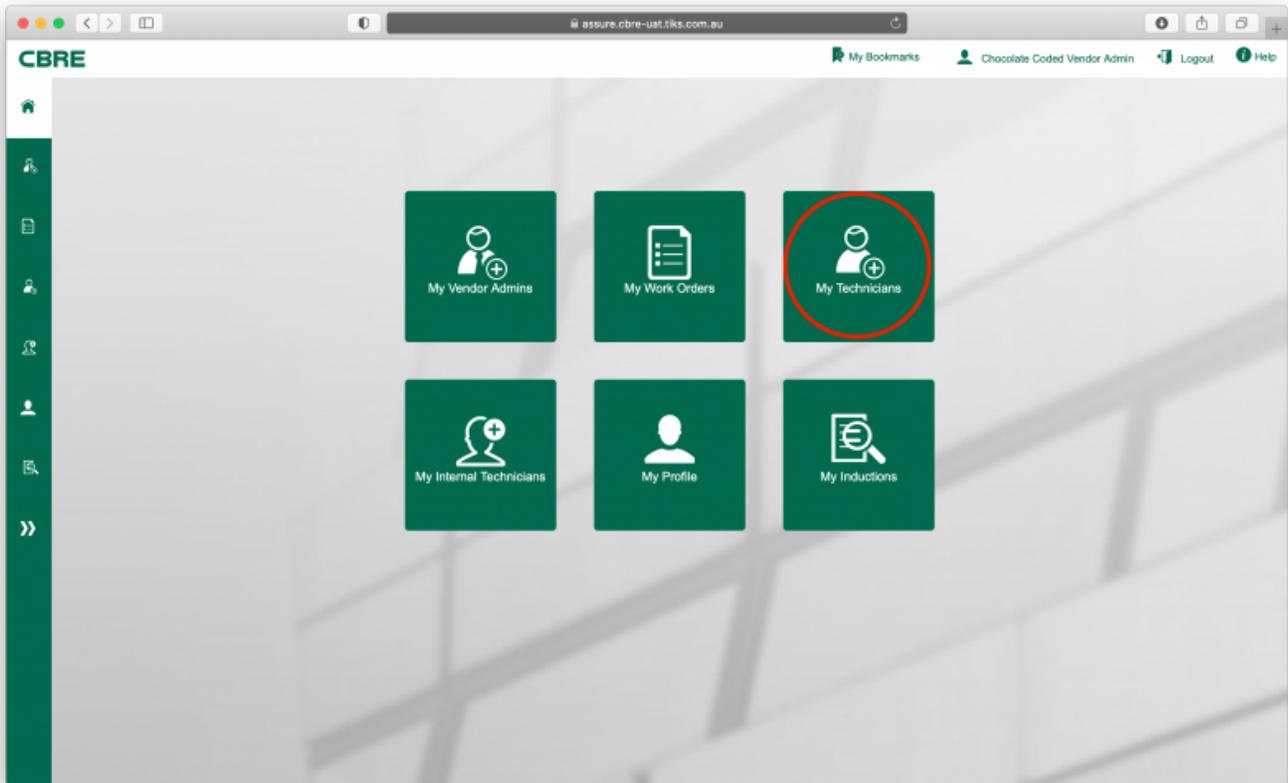
Next, complete the registration form. Once the registration is complete, the technician will receive an invitation email.
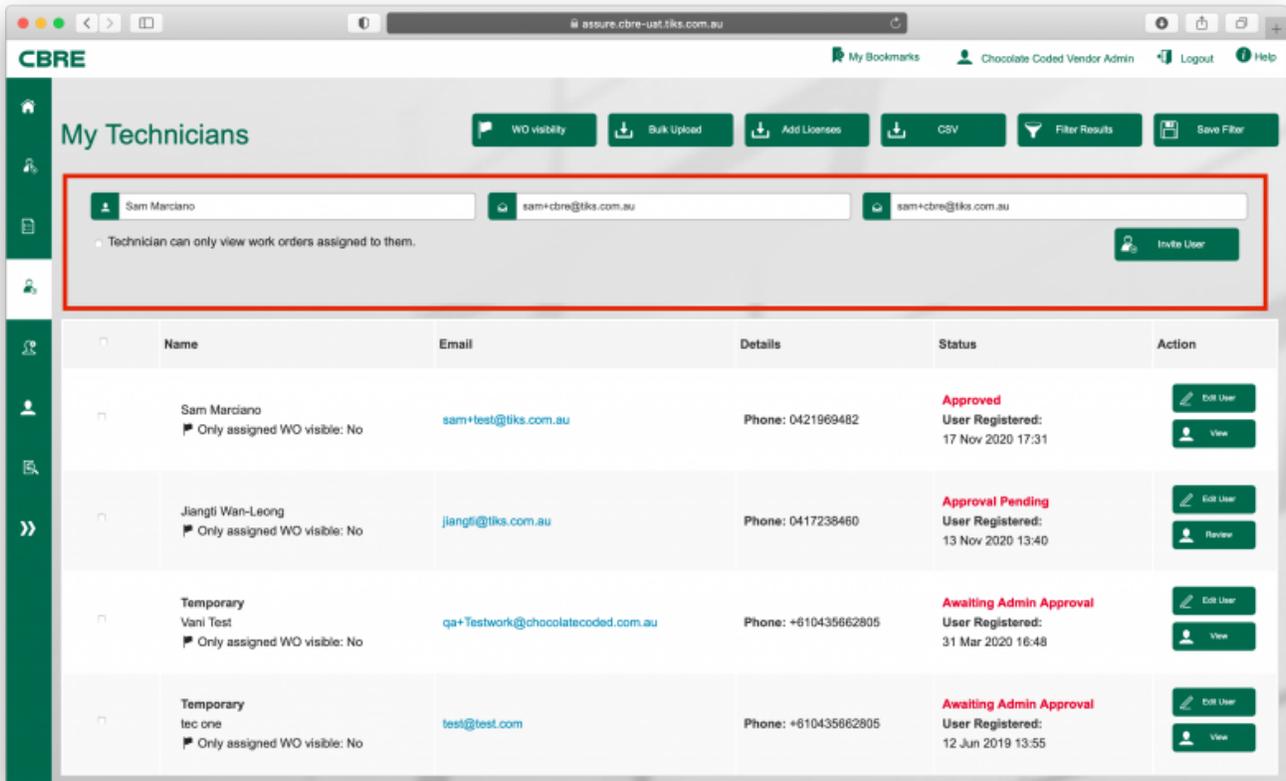
Review Competencies

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.
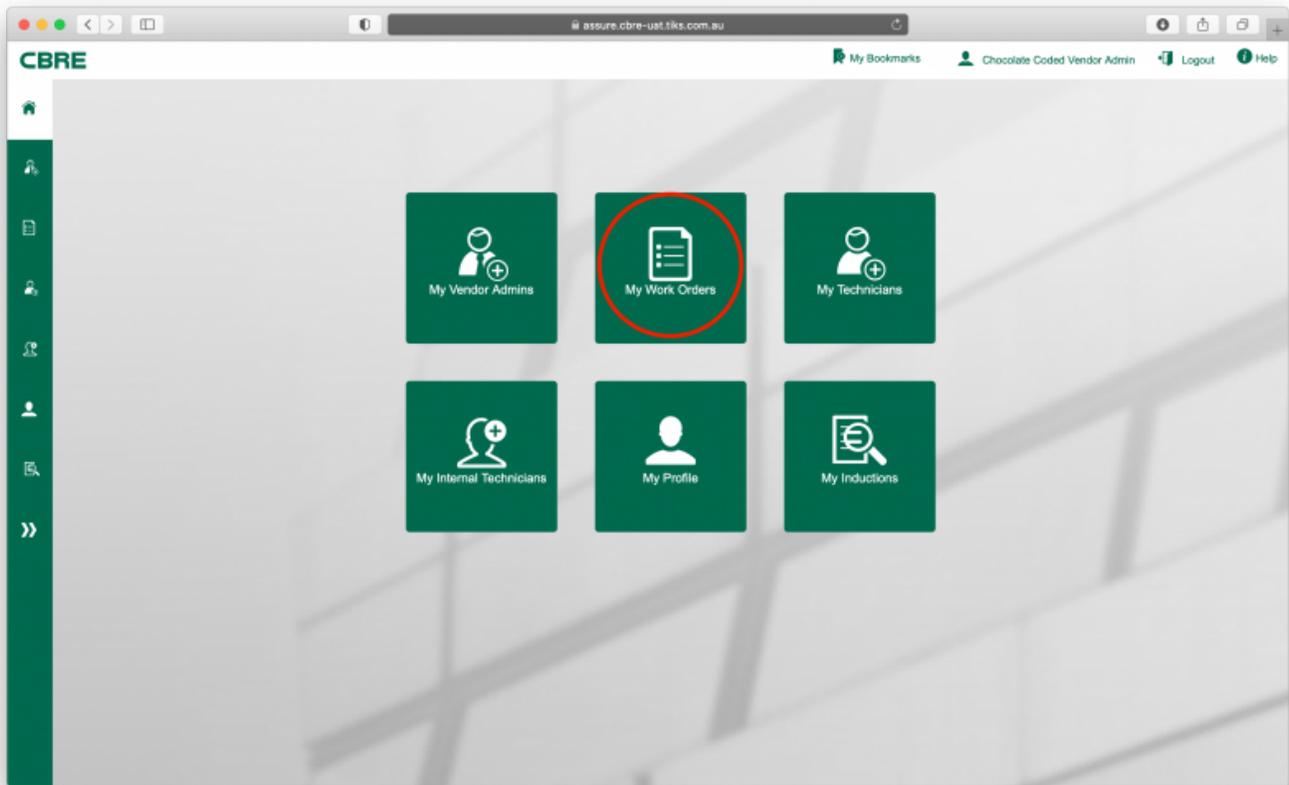
The Work Order screen main view:

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:

This will take you to the details screen:

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

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

A full list of your technicians will appear:
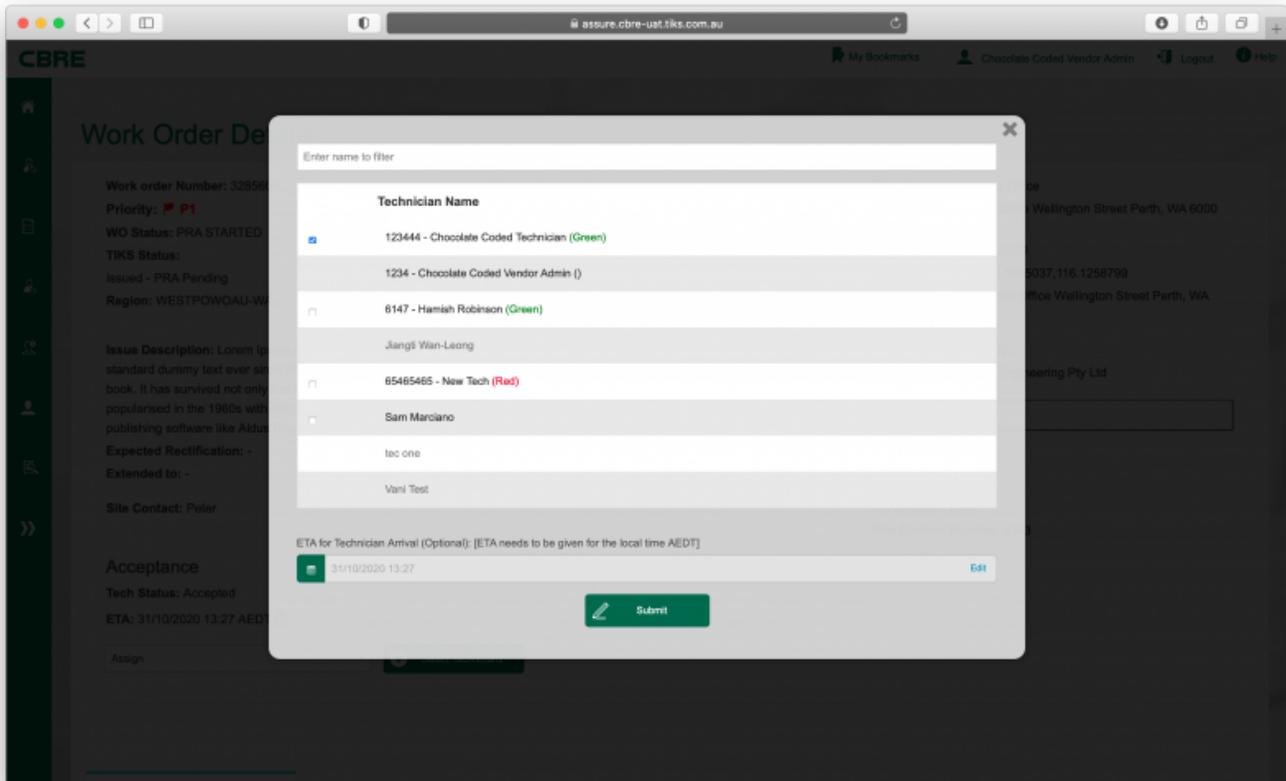
If you need to use a technician with an expired competency, they can update their details in real time, so you can approve their changes and allocate a work order immediately. Select the technician and click Submit to assign it to them. Once you have assigned a work order to a technician, it will appear 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.
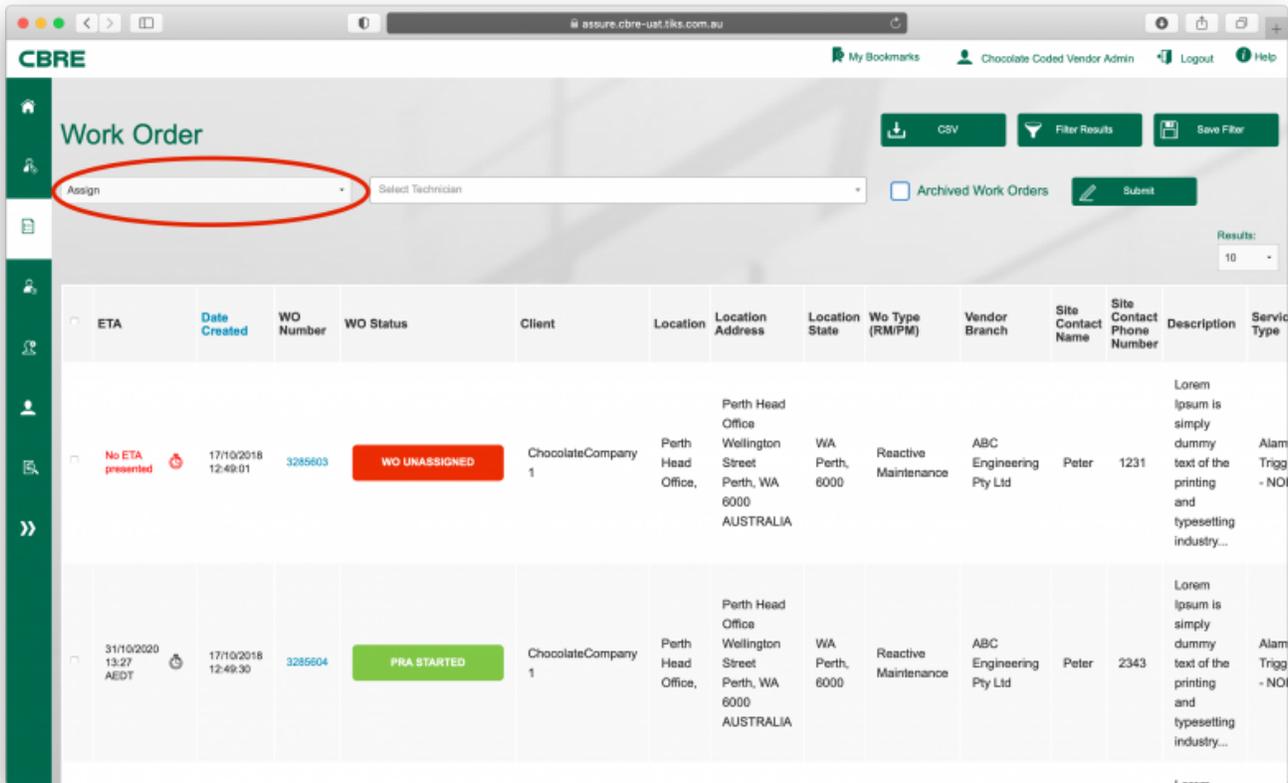
Reassign a Work Order/Remove Technician from Work Order

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.

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:

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.

Revision #5

Created 4 years ago by Sam Marciano

Updated 3 years ago by Robert Milagre