Axis Portal™

Tenant Request
User Manual

AXIS Portal Client Support

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Getting Started

System Requirements

- Property employees who require access to Axis Portal ™ Tenant Requests must have Internet access and Internet Explorer 6 or higher. Axis Portal™ is not compatible with Safari or other web browsers.
- Tenant Requests within Axis Portal ™ is powered by Angus AnyWhere™, and in order to function properly, pop-ups and cookies must be enabled in the web browser.
- Axis Portal ™ is designed for viewing at 1024 x 768 browser pixel resolution or higher.

Introduction to Tenant Request

Axis Portal™ Tenant Request, powered by Angus AnyWhere™, is a fully Web-enabled system designed to manage and streamline the work order completion process.

A request is created when a tenant has a need for service. Requests are converted automatically by Axis Portal into TR work orders. Tenants are able to make requests using the TSI (Tenant Service Interface); they can also be made by Administrators on a tenant's behalf from within Axis Portal.

If sufficient information is provided in the request, the work order can be automatically assigned and dispatched using the routing table (for more information on work order routing, see About Work Order Routing and associated topics). Otherwise, the work order is placed in the Outstanding list, where an Administrator may complete the details necessary to assign and dispatch the work order.

Service Submission Methods

There are three ways that requests may be submitted for service:

1. **The Tenant Services Interface** Tenants can submit service requests via a Tenant Services Interface (TSI) created specifically for your company. Tenants simply access the Tenant Services Interface using their Internet Explorer browser and submit their requests.
2. **Direct E-mail** Requests can be sent directly to an e-mail address that is set up specifically for your company. This can be used if the tenant does not have access to a Web browser or if you do not have a TSI configured for your tenants. A confirmation e-mail will be sent to the tenant for future tracking.
3. **Manual Entry (Requests by Phone, FAX or in person)** If the tenant does not have access to the Internet, requests can still be made traditional methods such as phone, fax or in person. Property staff can manually enter these requests into the system on the tenant's behalf.

Processing Work Orders

Once the request has been entered into the system, a work order is generated. Your Axis Portal TR system provides work order routing which can automatically dispatch them to an Engineer. In some cases, usually dependant on the method used to submit the tenant request; additional information must be added to the work order before it is routable.

An assigned work order can be or printed, or electronically dispatched into the field to any email-capable device. Engineers can directly communicate with the Axis Portal TR system, updating the status of a work order in real-time. Engineers carrying BlackBerry™ devices can utilize a custom Tennant Request application, allowing them to easily manage their work orders.

Administrators can view and manage work orders by accessing the Axis Portal™ administrative site. Tenants and employees can subscribe to progress notifications via email. Tenants can additionally be informed of the status of their request (and subsequent work order) through the Tenant Services Interface (TSI).

Completed work orders can be closed once an Administrator adds a service and reviews tenant chargeable amounts through the billing verification process.

Setting up Tenant Request

Tenants and Users

About Tenants and Users

Tenants who will be using the Axis Portal™ Tenant Request system must have been first added to the system. Under each tenant, the individuals who will be submitting requests must be added as well; these individuals are referred to as users.

To add, edit, or delete tenants and users refer back to the User Groups/ Tenants Setup section of the Axis Portal Help Handbook.

Vendors

Control Panel > Setup > Vendors

About Vendors

Vendors are external tradespeople who are contracted for work. They are configured similarly to employees, except they have no login information. Their electronic contact information is also different. A vendor may have more than one contact phone number or electronic dispatch email address. Certain reports are configured to distinguish hours and costs between in-house and contracted (outsourced) labor.

Vendor Profiles

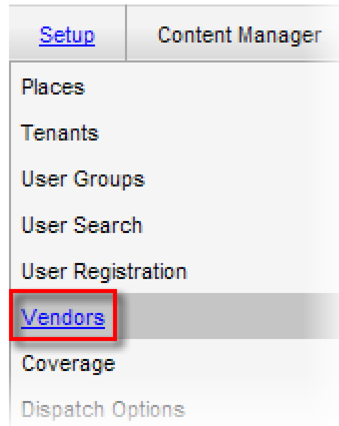
Vendor information is added, modified, and viewed on the Vendor Profile screen. Vendor profiles contain contact, settings and device information.

Settings and Preferences

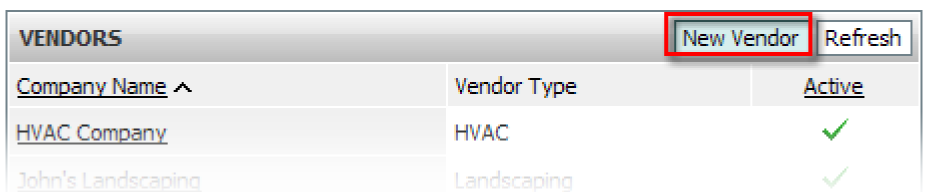
In this section of the screen, the Vendor availability is selected. The options are: Available on TR Work Orders and Available on PM Work Orders.

Adding a Vendor

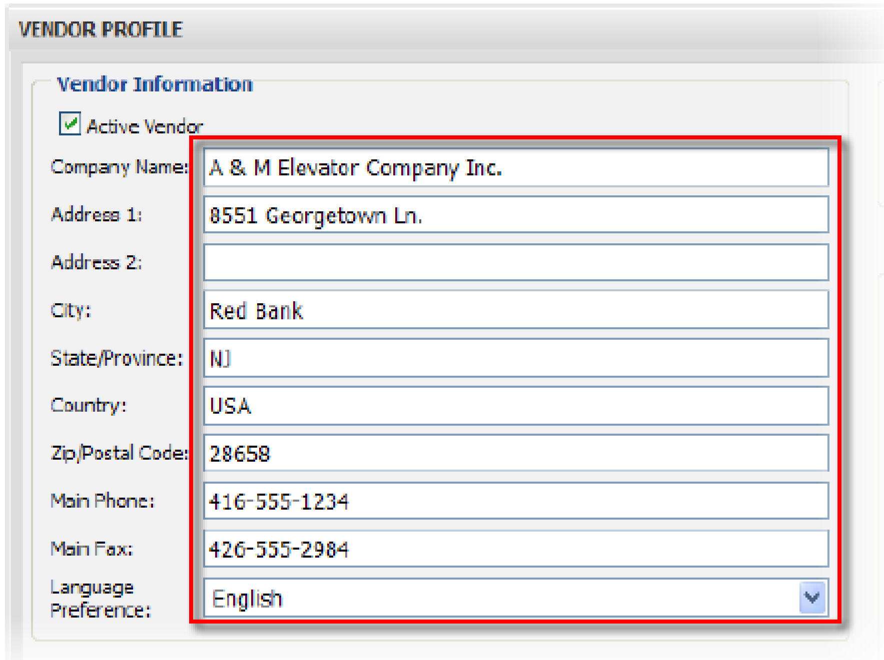
1. Click *Control Panel > Setup > Vendors.*



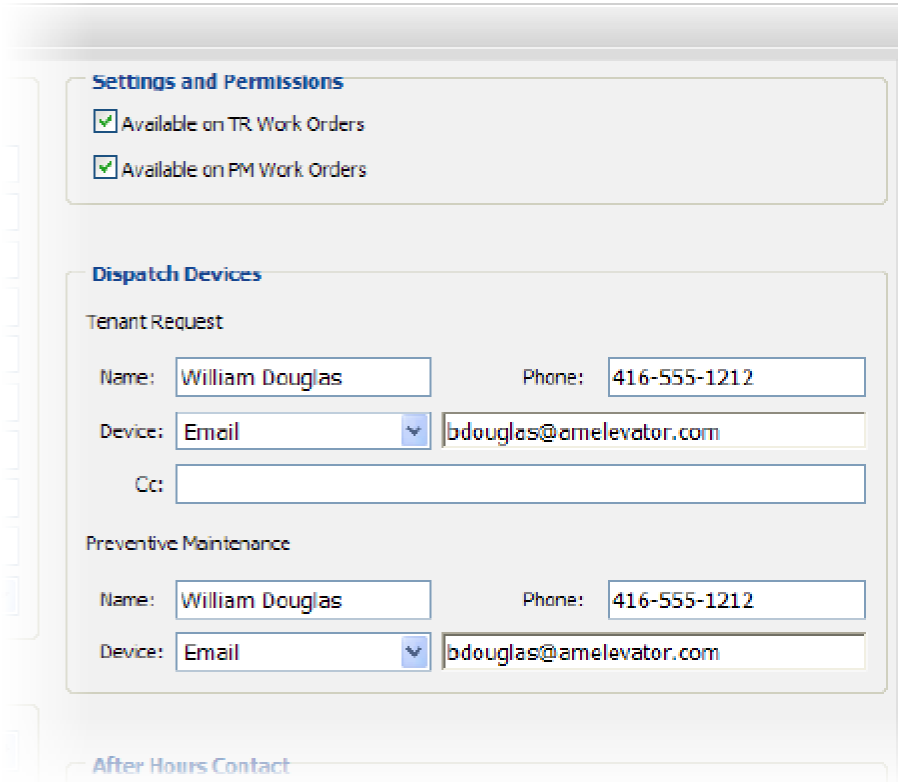
2. In the Vendors section, click **New Vendor**. The Vendor Profile screen is displayed.



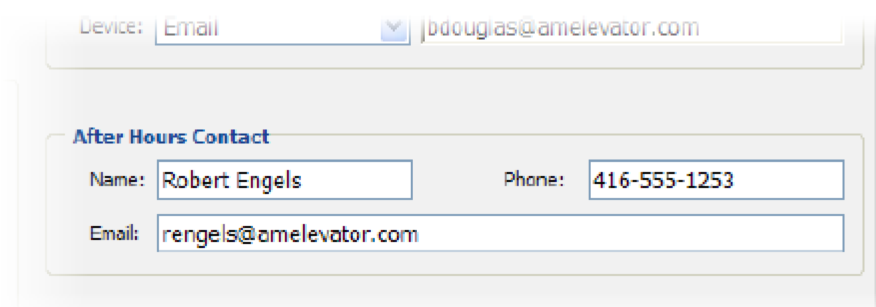
3. In the Vendor Information section, click the **Company Name** field and enter the company name.
4. Click the **Address 1** field and enter the company address. Click the **Address 2** field and continue entering the company address if more space is needed.
5. Click the **City** field and enter the city.
6. Click the **State/Province** field and enter the state or province.
7. Click the **Country** field and enter the country.
8. Click the **Zip/Postal Code** field and enter the Zip or postal code.
9. Click the **Main Phone** field and enter the main phone number.
10. Click the **Main Fax** field and enter the main fax number.



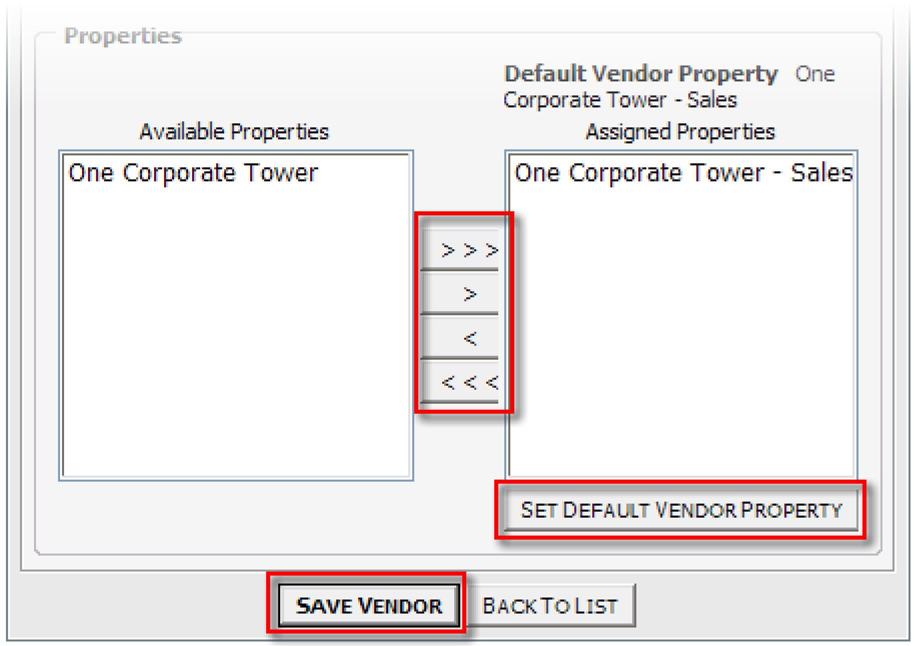
11. If the vendor will receive dispatches for TR or PM, click the appropriate checkboxes in the **Settings and Permissions** section.
12. Fill in the Dispatch Devices section for TR and/or PM.
13. Enter the Name and Phone number of the person who receives Work Orders.
14. Select the appropriate Device type and enter the e-mail address.
15. To send work orders to additional recipients, enter their address in the **CC:** field. (If there is more than one, separate each address with a semi-colon).



16. If there is an after-hours contact, enter their contact information in the After Hours Contact section.

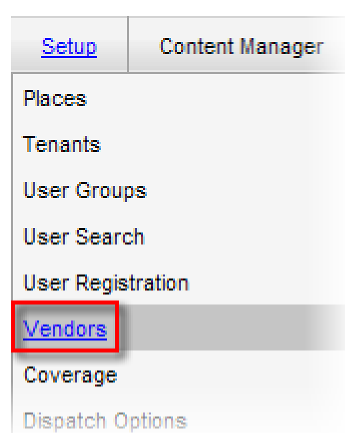


17. In the Properties section, select the properties that the Vendor should be assigned to. Click the property name in the Available Properties list, then click "**>**" to move this property to the Assigned Properties list. To assign all properties to the Vendor, click "**> > >**".
18. To set a Default Property, which will be automatically displayed on the Home page and on the Tenant Requests and TR Work Orders screens when the vendor logs in, click the property name in the Assigned Properties list and move it over to the Default Vendor Property box using the directional arrows. Click **Set Default Vendor Property**.
19. Click **Save Vendor**.

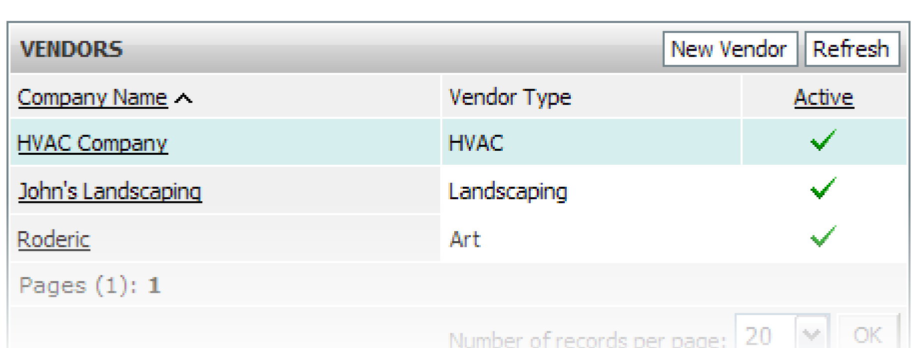


Editing a Vendor

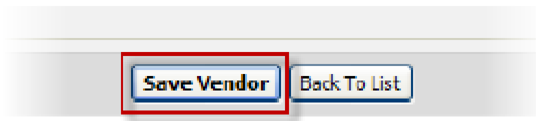
1. Click *Control Panel > Setup > Vendors*



2. In the Vendors section, click the vendor name. The Vendor Profile screen is displayed.



3. Make any necessary changes to the Vendor Profile. See the Adding a Vendor topic for more specific information.
4. Click **Save Vendor**.



Deleting Vendors

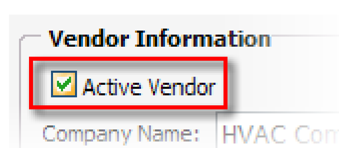
Vendors cannot be deleted, but they can be deactivated. See Deactivating Vendors.

Note:

- Do not rename a vendor, as this will cause the vendor name to change in work order histories as well. In order to maintain the integrity of your work order histories, it is recommended that you instead deactivate vendors which you no longer use.

Deactivating Vendors

1. Click *Control Panel > Setup > Vendors*
2. In the Vendors section, click the vendor name. The Vendor Profile screen is displayed.
3. Click the **Active** checkbox to clear it.



4. Click **Save Vendor**.

Coverage Hours

Control Panel > Setup > Coverage

About Coverage Hours

Coverage Hours are the hours of operation for each property. Coverage Hours are used in conjunction with the Work Order Routing and Escalation features and controls when and if engineers receive work orders in the field.

Routing uses Coverage Hours to determine request assignment based on the time the request is required. The Escalation feature uses Coverage Hours to determine when to start and stop accumulating escalation time. Some reports list response time in Coverage Hours.

Shifts

Shifts determine the Coverage Hours. Coverage Hours can be comprised of multiple Shifts to facilitate management of properties with more than one shift in operation. For example, a common scenario is for a property to provide service for one shift on weekdays, and for a second shift on weekends. Any number of shifts can be set up in order to best manage requests for each property.

Notes:
- Shifts cannot overlap.
- Work orders can be routed differently for each shift.
- Shifts cannot cross midnight. In such cases, create 2 shifts. For example, a property runs from 8:00am to 1:00am. Create a shift from 8:00am to 12:00am, and a shift from 12:00am to 1:00am.

Regular Hours and After-Hours

All hours accounted for in the shifts that are set up are considered to be "Regular Hours." Remaining hours of the day that are not covered by shifts are considered to be "After Hours". Work Order Routing can be defined for After Hours.

If Work Order Routing is not defined for After Hours, requests received during that time will simply appear on the Outstanding list to be processed manually.

24-Hour Days

A Shift can be 24 hours a day by selecting the **24 hr** checkbox when setting up or editing the Shift information.

Property is Closed

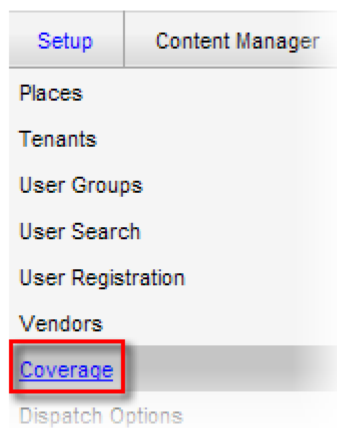
If the property is closed for a day, indicate this by leaving the **Begin** and **End** fields blank as well as making sure the **24 hr** checkbox is not selected. The system will interpret this as property being closed for that day.

Holidays

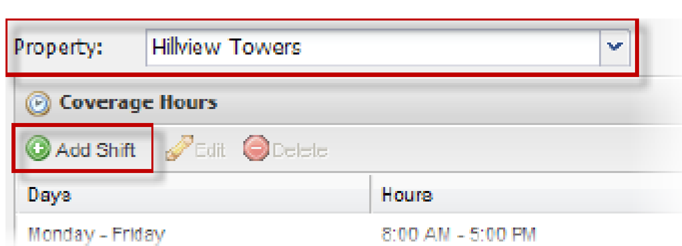
If the property will be closed for a holiday or any other day, temporarily change the Regular Hours entries to accommodate this. On the Coverage Hours Settings screen, simply delete any entries for that day and make sure the **24 hr** checkbox is not selected. Be sure to change the Regular Hours back to the correct configuration after the holiday has passed.

Setting up Shifts

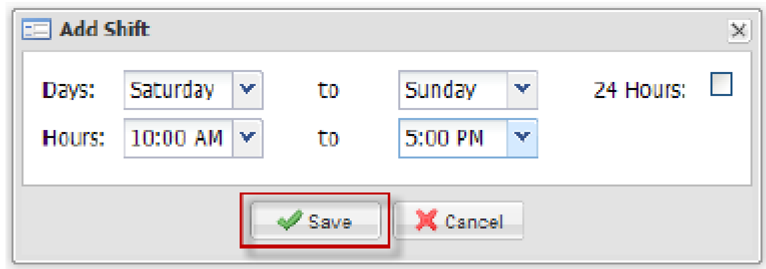
1. Click Control Panel > Setup > Coverage



2. Click the **Property** field and select the desired property from the drop-down menu. The Shifts screen is updated to display all shifts associated with the property you have selected; if you have not set up any shifts yet, this list will be empty.
3. Click the **Add Shift** button.



4. A pop-up window will open, allowing you to configure the new shift.
5. Use the **Days** drop-down lists to select the days that the shift covers.
6. Use the **Hours** drop-down lists to select the start and end time for the specified days. If this is a 24-hour shift, click the **24 Hours** checkbox instead.
7. Click **Save** to save the shift.

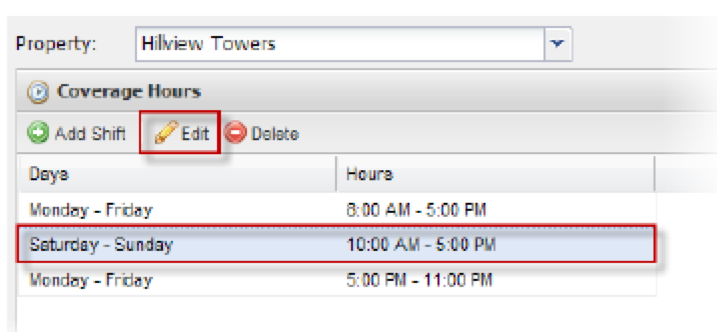


Notes:

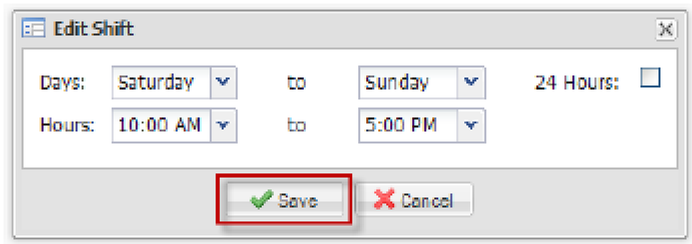
- Dispatching only occurs during coverage hours.
- Requests dispatched in off hours will appear on the Outstanding list unless after hours routing is required.
- Change for statutory holidays.
- Escalation only occurs during coverage hours.
- Hours are determined by shifts.
- Shifts cannot overlap.

Editing Shifts

1. Click *Control Panel > Setup > Coverage*
2. Click the **Property** field and select the desired property from the drop-down menu. The Shifts screen is updated to display all shifts associated with the property you have selected.
3. Select the shift you want to modify, then click the **Edit** button.

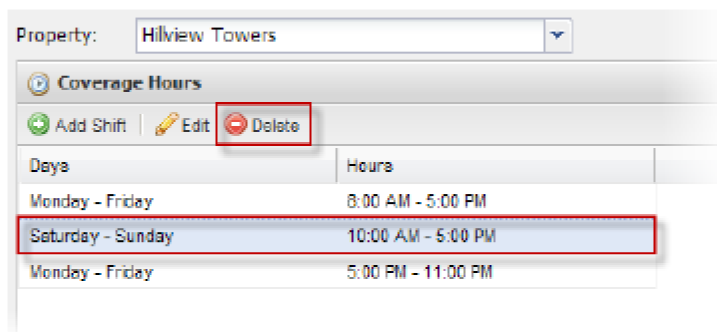


4. In the pup-up window that opens, make any necessary edits. See the Setting up Shifts topic for help in making changes to the fields.
5. Click **Save**.

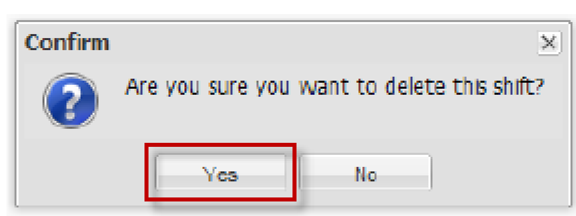


Deleting Shifts

1. Click *Control Panel > Setup > Coverage*
2. Click the **Property** field and select the desired property from the drop-down menu. The Shifts screen is updated to display all shifts associated with the property you have selected.
3. Select the shift you want to modify, then click the **Delete** button.



4. A confirmation dialogue will open. Click **Yes** to delete the shift.



Note:

- There must be at least one shift configured for a property.

Scheduled Work Order Dispatch Options

Control Panel > Building Services > Tenant Requests > Work Order Routing

About Scheduled Dispatch Options

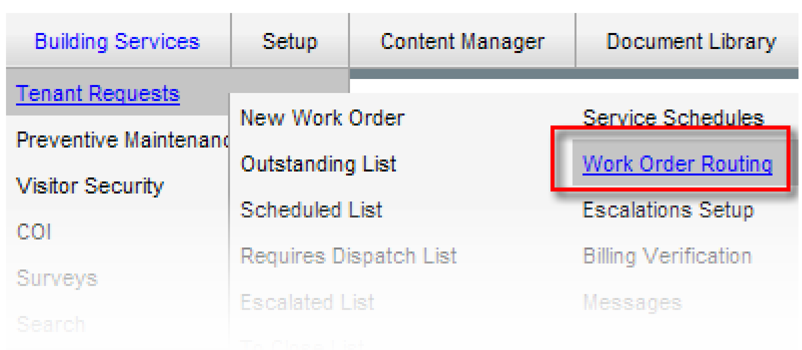
The Scheduled Work Order Dispatch Option provides an opportunity for scheduled work orders to be automatically dispatched ahead of the due date and time.

TR Work Orders

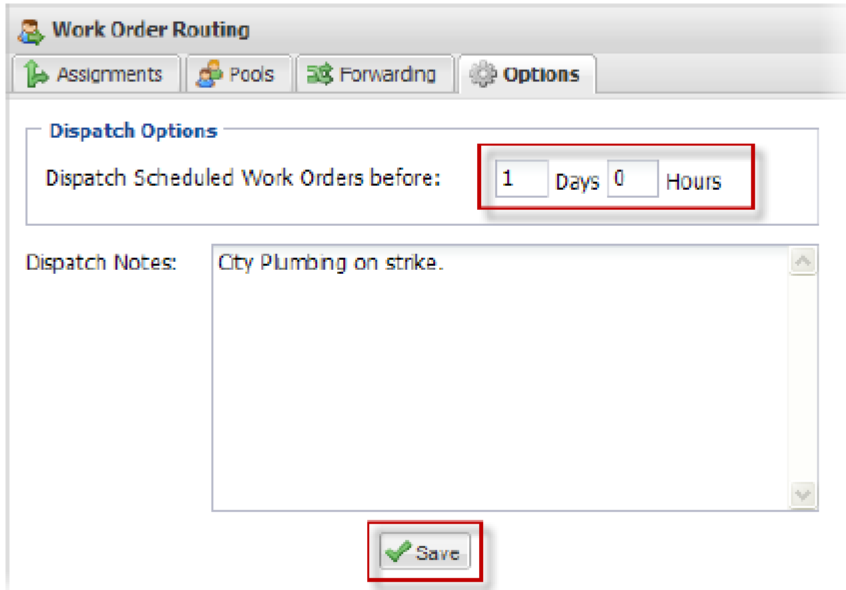
TR Work Orders can be set to dispatch a specific number of hours ahead of the Requested Date and Time. Work Order Routing must also be set in order for the system to dispatch these work orders. Axis Portal™ allows future dated work orders to be dispatched up to 30 days in advance. This can be configured for the entire property via Scheduled Work Order Dispatch options or for individual work orders via Dispatch Options on the work order.

TR Work Order Dispatch Options

1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*



2. Under the **Options** tab, indicate how many days and hours in advance that scheduled work orders should be dispatched.
3. Click **Save**.


Work Order Routing
Assignments
Pools
Forwarding
Options
Dispatch Options
Dispatch Scheduled Work Orders before:
1
Days
0
Hours
Dispatch Notes:
City Plumbing on strike.
Save

Service Schedules

Control Panel > Building Services > Tenant Requests > Service Schedules

About Service Schedules

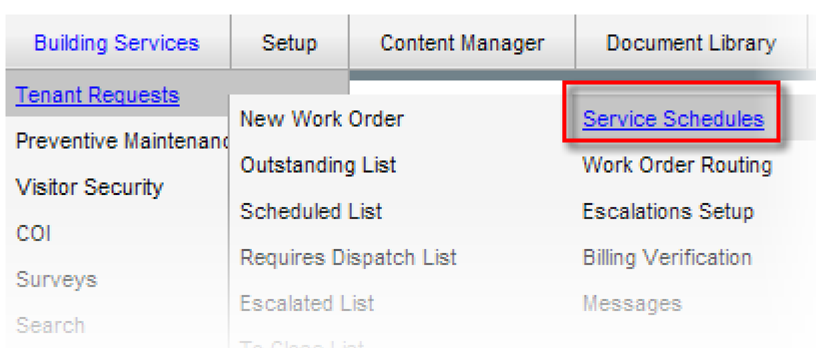
Service Schedules itemize all of the services provided to tenants. For each service, you can specify whether it is billable or not, (If the service is not billable, the cost is still tracked.) as well as the billable amounts, if the service is billable.

When closing a work order, Services Provided are inserted for billing and reporting. The rules and rates for services are property-specific; however, Axis Portal™ can also accommodate tenant-specific rules and rates. The list of services is conveniently grouped by request type on the Service Schedules page and there is no limit to the number of services per request type.

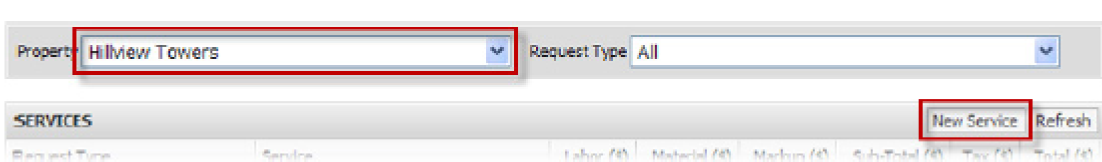
Note:
- Tenants do not see the list of services provided and amounts.
- You can add as many services as you need for each Request Type.

Adding a New Service

1. Click *Control Panel > Building Services > Tenant Requests > Service Schedules*

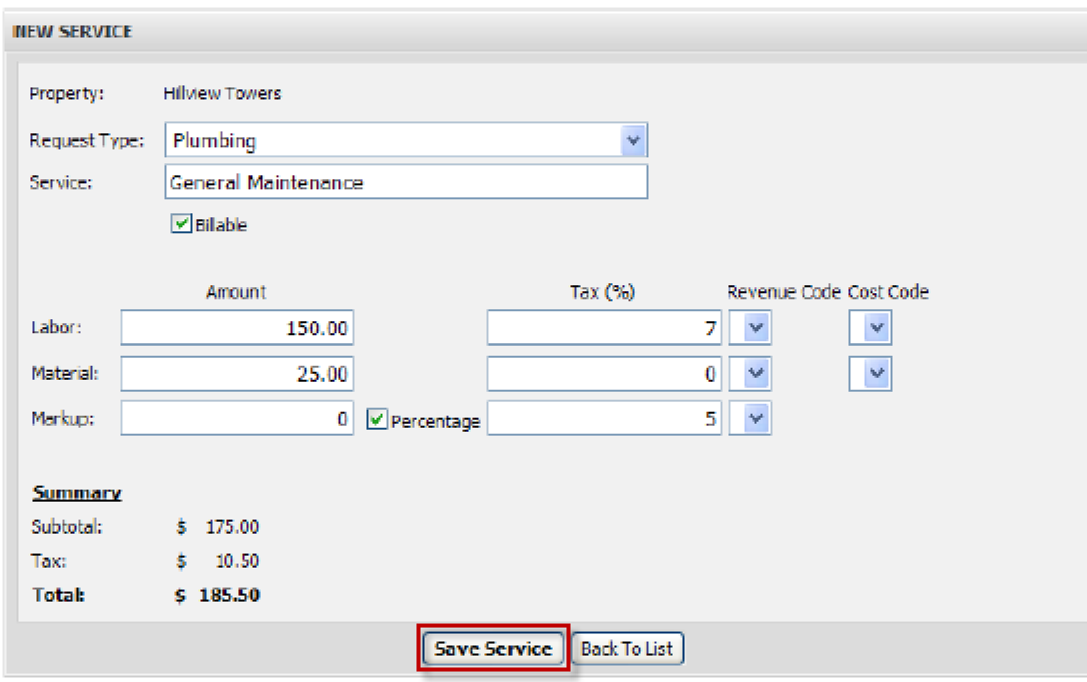


2. In the Filter section, click the **Property** field and select the desired property from the drop-down list.
3. In the Services section, click **New Service**.



4. Click the **Request Type** field and select the desired request type.
5. Click the **Service** field and enter the name of the service.

6. The **Billable** checkbox is selected by default. If this service is not billable, clear the **Billable** checkbox.
7. Enter the costs in the **Labor** and **Material** fields if applicable. Click the **Tax (%)** field and enter the tax amount.
8. If markup costs apply to this service, enter the amount in the **Markup** field. If the amount is a percentage of labor and materials, click the **Percentage** checkbox to select it. Click the **Tax (%)** field and enter the tax amount.
9. If Administrative costs apply to this service, the **Admin** field may be visible. (This field is optional and is set up for the entire company.) Enter the amount in the **Admin** field. If the amount is a percentage, click the **Percentage** checkbox to select it.
10. Click **Save Service**.

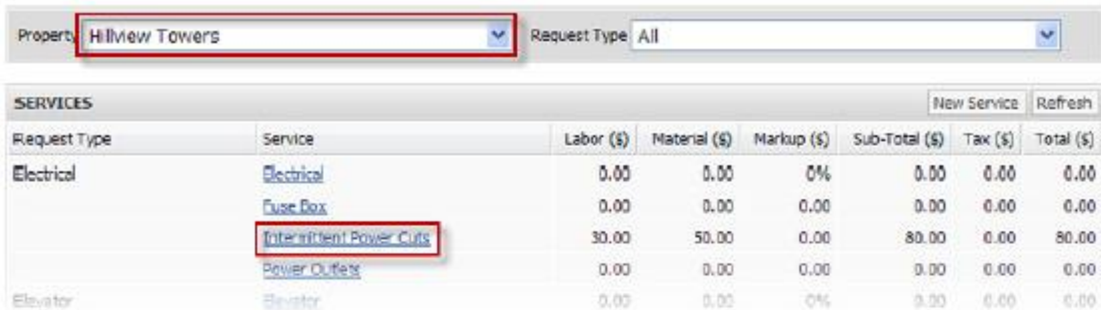


Note:

- If billing rules have been enabled for your company, they will be visible in the New Service section.

Editing a Service

1. Click *Control Panel > Building Services > Tenant Requests > Service Schedules*
2. In the Filter section, click the **Property** field and select the desired property from the drop-down list.
3. In the Services section, click the desired service. The Edit Service screen is displayed.

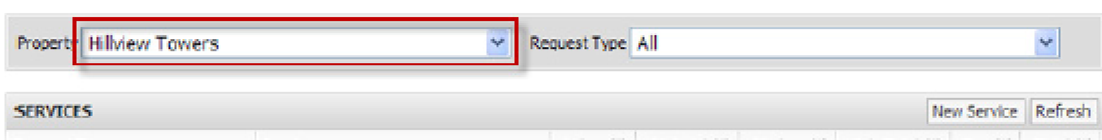


4. Make any necessary changes, then click **Save Service**.

Creating a Tenant Exception

Tenant exceptions can be used to define alternate billing schemes for specific tenants. To set up a tenant exception, follow the steps outlined below:

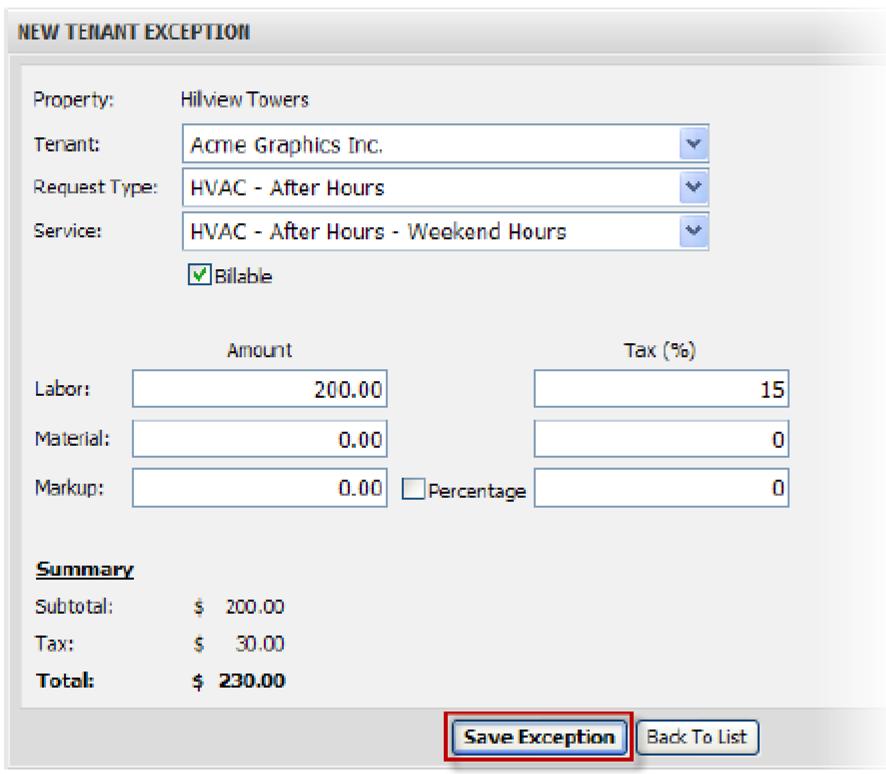
1. Click *Control Panel > Building Services > Tenant Requests > Service Schedules*
2. In the Filter section, click the **Property** field and select the desired property from the drop-down list.



3. Scroll down to the Tenant Exceptions section, click **New Tenant Exception**.

4. Click the **Tenant** field and select the tenant from the drop-down list.
5. Click the **Request Type** field and select the request type.
6. Click the **Service** field and select the service.

7. The default billable information at the property level is displayed. Make any necessary changes for the tenant exceptions and click **Save**. If this service is not billable, clear the **Billable** checkbox.
8. For labor or material costs, click the **Amount** field and enter the amount. Then click the **Tax (%)** field and enter the tax amount.
9. For Markup costs, click the **Amount** field and enter the amount. If the amount is a percentage of labor and materials, click the **Percentage** checkbox to select it. Then click the **Tax (%)** field and enter the tax amount.
10. Click **Save Exception**.

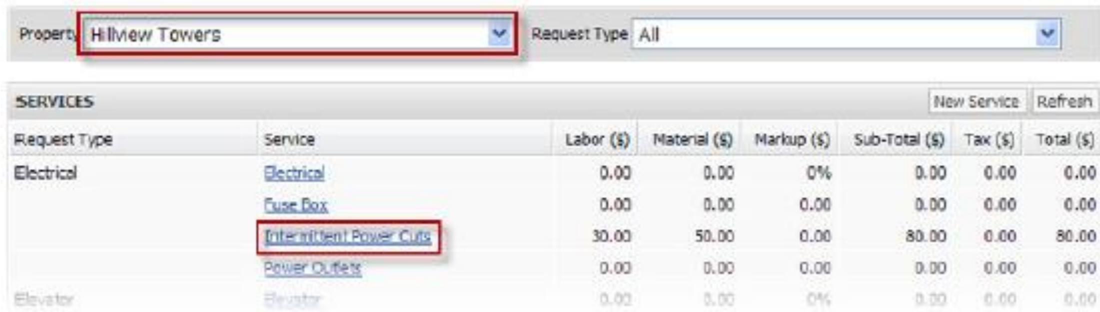


Note:

- If billing rules have been enabled for your company, they will be visible in the New Service section.

Deleting a Service

1. Click *Control Panel > Building Services > Tenant Requests > Service Schedules*
2. In the Filter section, click the **Property** field and select the desired property from the drop-down list.



3. In the **Services** section, click the desired service. The Edit Service screen is displayed.
4. Click **Delete Service**. A pop up window will be displayed asking for confirmation. Click **Yes** to delete service.

Work Order Routing

Control Panel > Building Services > Tenant Requests > Work Order Routing

About Work Order Routing

The Work Order Routing feature provides a time-saving solution for Administrators in the process of assigning work orders. Routing automatically assigns and dispatches these new work orders to selected employees or vendors based on the request type.

When a request is entered into the system, the system will observe which shift is active at the time of the request. Every request entered into the system has a request type, even if only Unspecified. The system will then check to see who is responsible for requests of this type during the current shift.

If Work Order Routing is not used, or if there are no employees for a particular request type in the current shift, the new work order will be displayed on Outstanding and Requires Dispatch lists.

Work Order Routing Modes

Routing can be configured at a property level, or if a property consists of more than one building, routing can be configured at a building Level. This allows Axis Portal™ to accommodate routing for Engineers who may not work in every building within the property.

Note:

- The routing mode choice must be made at the time that the property is setup in the system. Building mode is only available to those properties with multiple buildings.

Requests Made After Hours

If a work order has been entered outside of shift hours ("after hours"), the system will dispatch the work order at the start of the next available shift.

For example, consider a new request submitted on Friday at 6:00pm, during which no employees are available to receive work, as defined in Work Order Routing. Suppose that the next shift during which an employee is available to receive work is Monday between 6:00am and 12:00pm. The request will be auto-routed on Monday at 6:00am.

The *Unspecified* Request Type

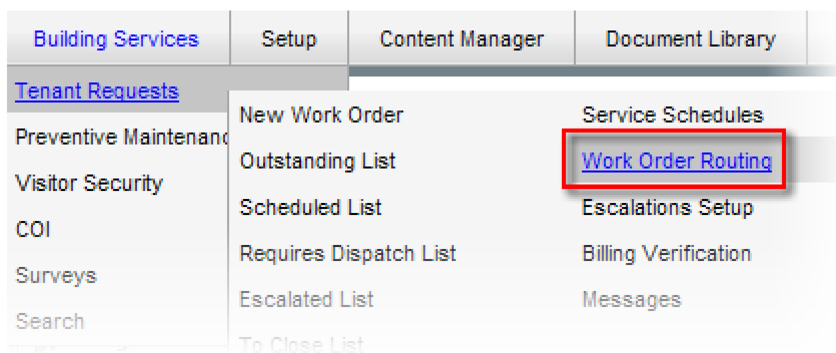
If a request is submitted via e-mail or a request type is not selected on the “Request Entry" page of the Tenant Request website, the request will default to an Unspecified type. The Unspecified request type can be selected by employees or tenants when the type of work is unclear.

Unspecified requests can be assigned to an employee just like any other request type. For example, all Unspecified request types could be routed to an administrative employee so that they can then be assigned to the appropriate trade employee.

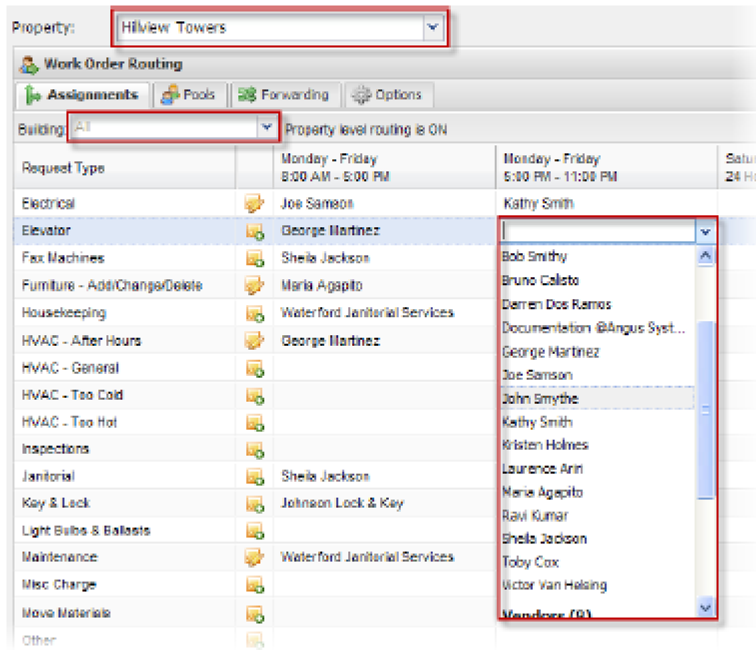
Setting up Work Order Routing

The Work Order Routing list allows you to configure the default employee assignment for each request type for each shift. For more information on coverage hours, see the Coverage Hours section.

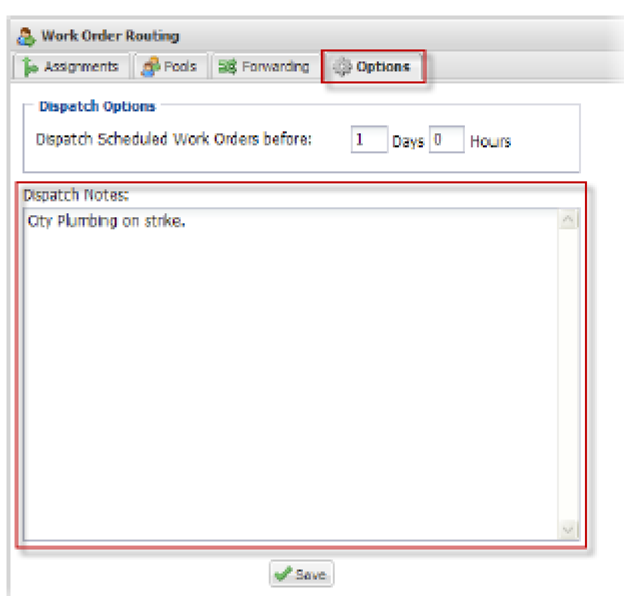
1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*



2. By default, the **Assignments** tab is displayed. Using the drop-down list provided, select the property which you would like to set up routing for.
3. If building-level routing is activated, you will also be able to select a specific building from the drop-down list provided
4. Click on the shift beside the request type you want to configure routing for. A drop-down list will appear, allowing you to assign routing for the shift you have selected.



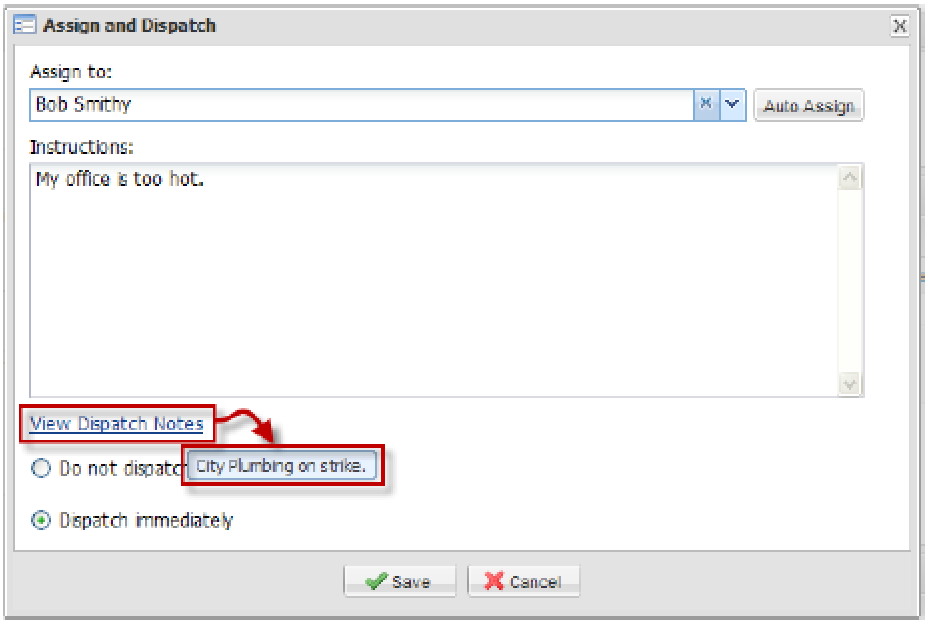
5. Repeat this process for each request type that should have routing assigned.
6. If there are any general dispatch notes that should displayed on a work order, enter them in the property's general **Dispatch Notes** text box located under the **Options** tab.



About Dispatch Notes

Dispatch notes can be assigned to request types in order to help Administrators decide how to dispatch work orders that require more complex considerations. For example, when more than one vendor is available to respond to a request type, a dispatch note may be added to the request type.

Dispatch notes are internal notes which assist the dispatcher in assigning a work order. When a Request Type with a dispatch note is selected in a work order, the dispatch notes appear in the **Assign and Dispatch** pop-up window as a link which can be clicked on.

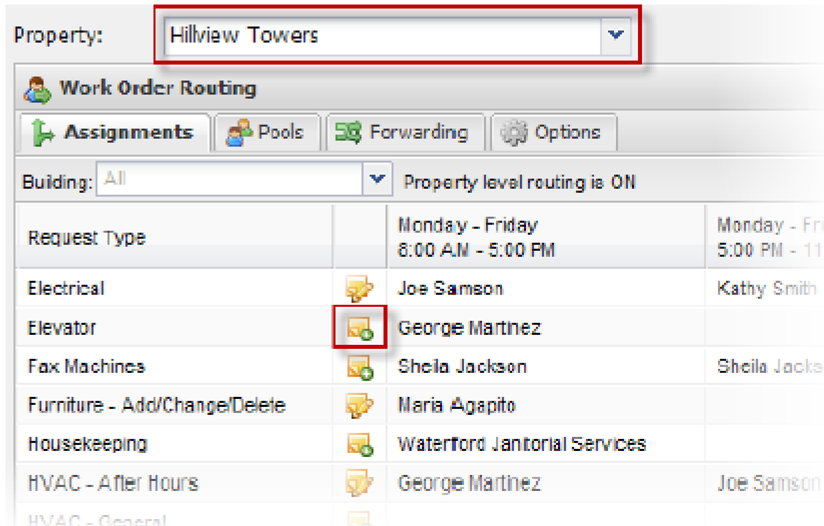


Adding Dispatch Notes

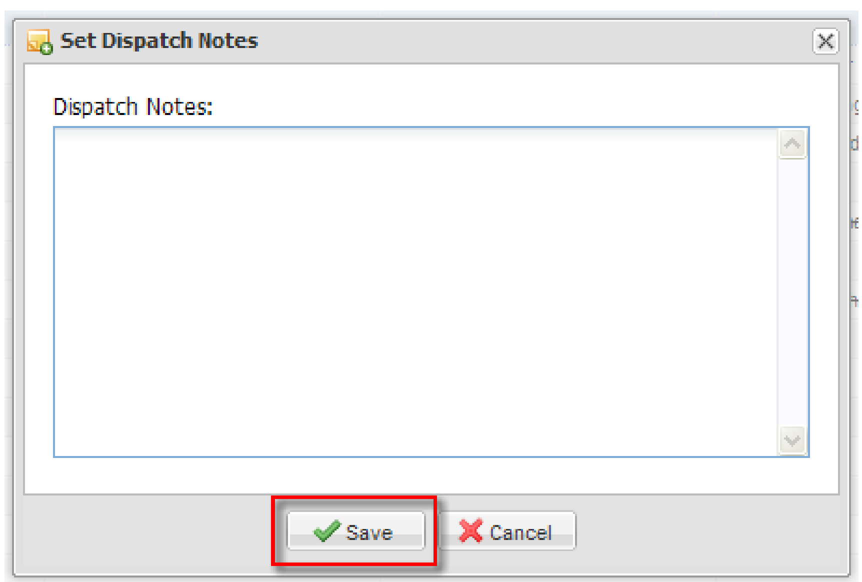
Dispatch notes are designed to help Administrators communicate important information to each other to help them in the course of their day. These are internal notes that are displayed when dispatching work orders in Axis Portal™; they are not dispatched with the work orders.

To add Dispatch Notes:

1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*
2. Click the **Property** field and select the desired property from the drop-down menu.
3. Locate the request type which requires a dispatch note, then click the Add Note icon () beside it. The Set Dispatch Notes pop-up is displayed.



4. Enter the dispatch notes.
5. Click **Save**.



Work Oder Forwarding

Control Panel > Building Services > Tenant Requests > Work Order Routing

About Work Order Forwarding

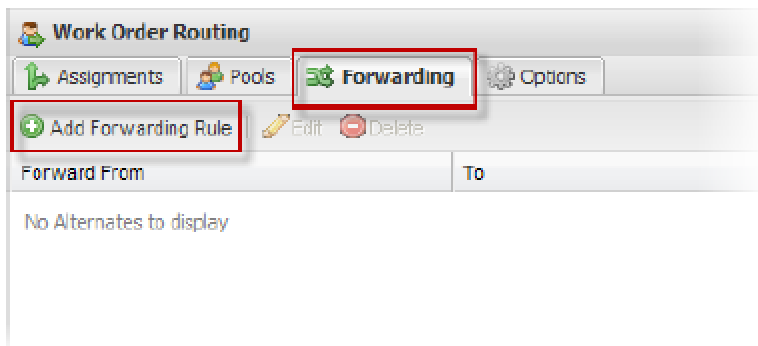
Setting up forwarding rules allows you to temporarily reassign work orders without modifying the routing table. This is especially useful when someone is on vacation or away due to illness. Once the employee is available again, you can remove the forwarding rule to restore standard routing.

Notes:

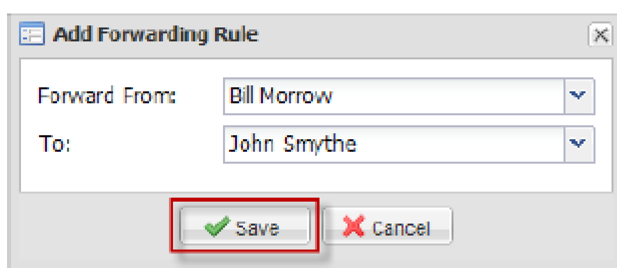
- Work orders that were assigned to an employee before the forwarding rule was set up must still be manually reassigned by the employee.
- You must delete a forwarding rule to deactivate it.

Adding a Forwarding Rule

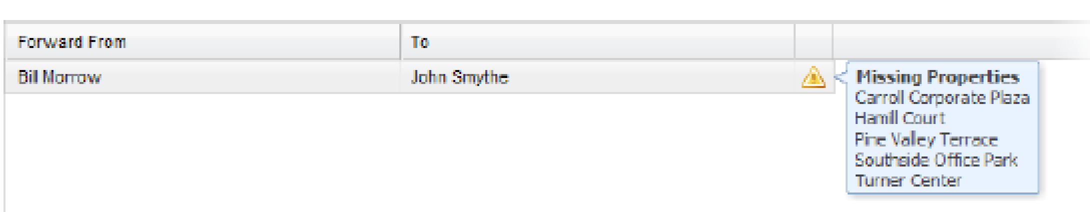
1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*
2. Under the Forwarding tab, click **Add Forwarding Rule**. The Add Forwarding Rule window will open.



3. Use the drop-down menus to fill out the **Forward From** and **To** fields, then click **Save**.

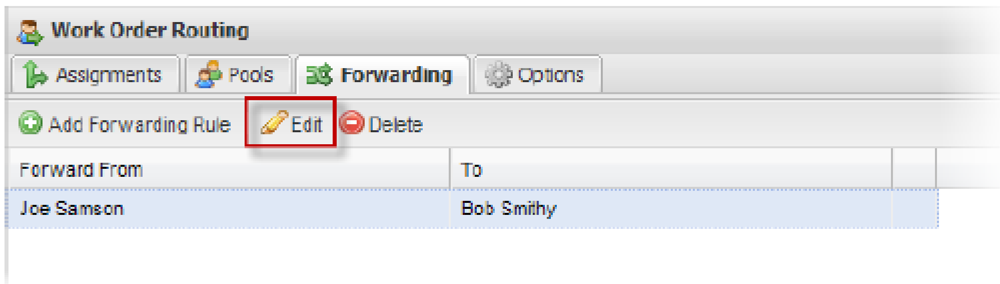


4. If there are any discrepancies in the forwarding rule, they will be marked with a ⚠. Discrepancies occur when the two employees are not assigned to all of the same properties.
   - Move the mouse pointer over the ⚠ to view a list of properties not covered by the employee being forwarded to.
   - This issue can only be corrected by choosing a different employee to forward to, or by modifying the properties that are assigned to the employee.

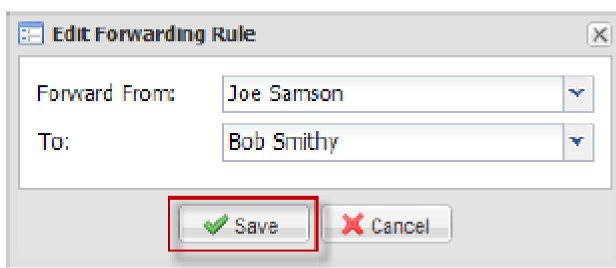


Editing a Forwarding Rule

1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*
2. Under the **Forwarding** tab, select the rule you would like to modify, then click **Edit**. The Edit Forwarding Rule window will open.

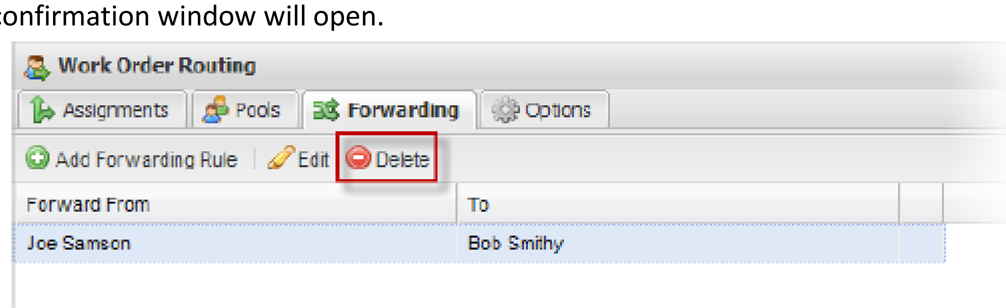


3. Using the drop-down lists provided, modify the forwarding rule as needed.
4. Click **Save**.

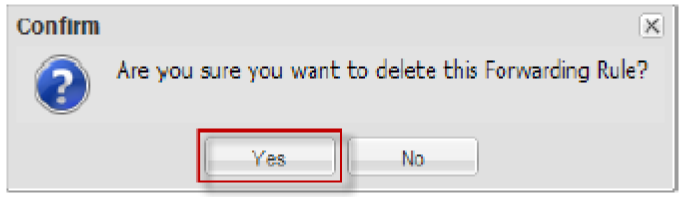


Deleting a Forwarding Rule

1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*
2. Under the **Forwarding** tab, select the rule you would like to remove, then click **Delete**. A confirmation window will open.



3. Click **Yes** to delete the rule.



Pools

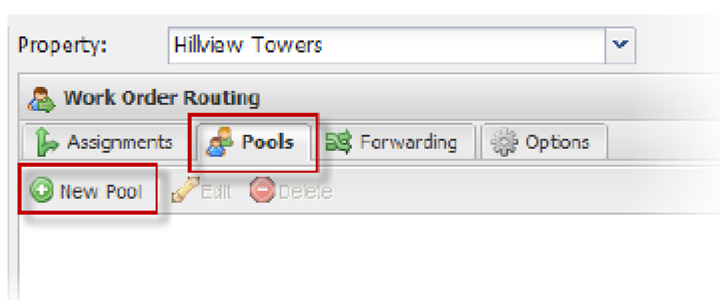
About Pools

Pools are predefined groups of employees. After setting up one or more Pools, you will be able to assign work orders to Pools, either by using the routing table, or by manually assigning a specific work order to a pool.

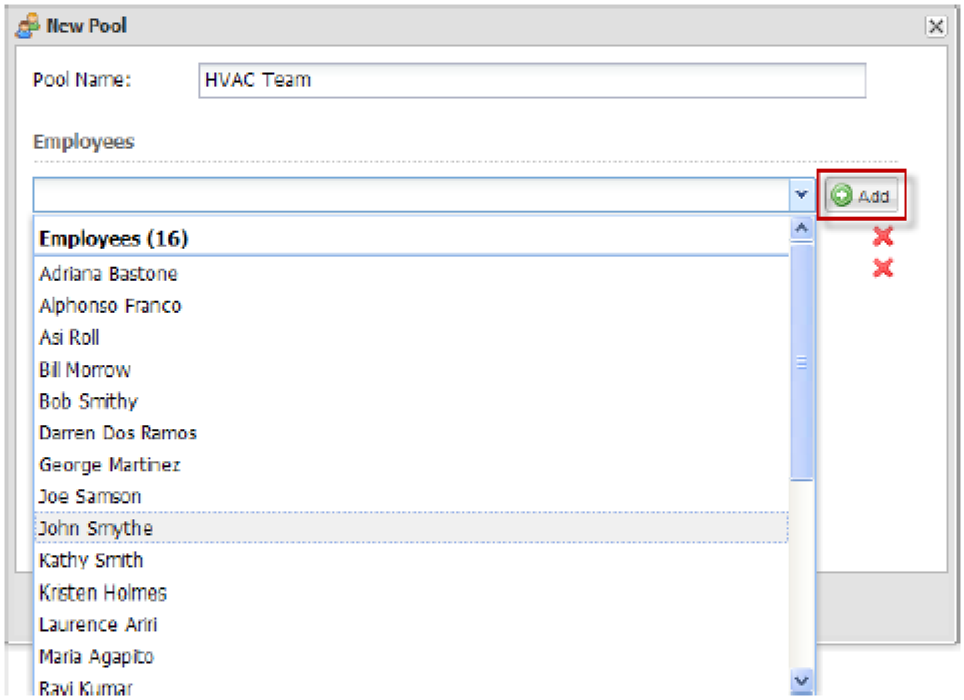
When a work order is assigned to a Pool, the work order details are sent out to every employee in the Pool. Each employee has the option to accept or reject the work order, the same as any other. The first employee to accept the work order will be assigned to it; all other employees will have the work order retracted from their device.

Creating Pools

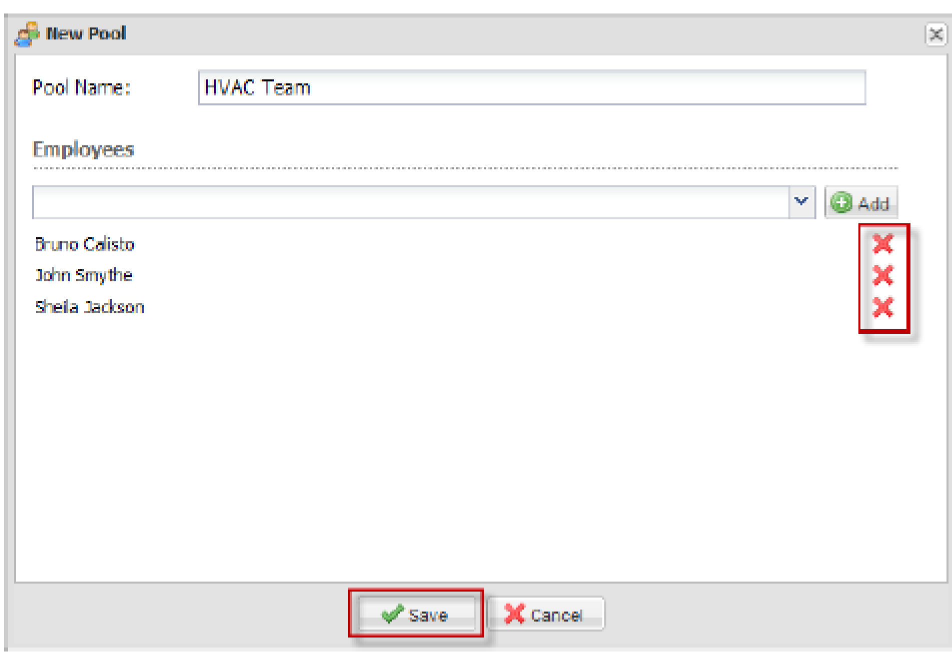
1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*
2. Under the **Pools** tab, click **New Pool**. The New Pool configuration window will open.



3. Enter a name for the Pool.
4. Use the drop-down menu to select an employee to add to the Pool, then click **Add**. Repeat this step until you are finished adding employees.



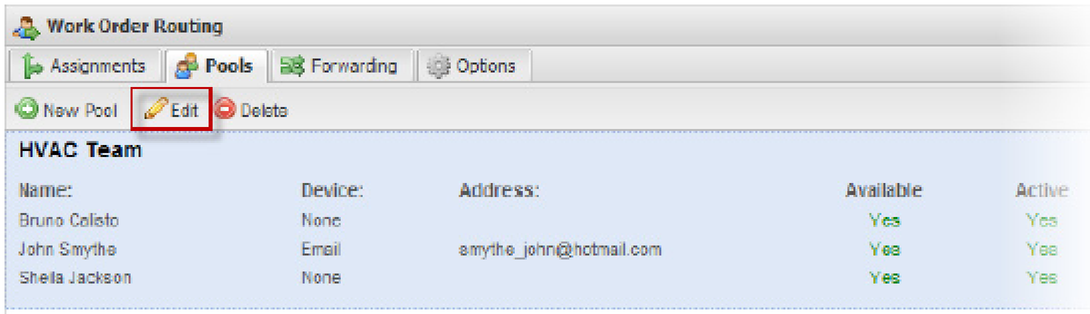
5. You can remove an employee from the list by clicking **X** beside the employee you would like to remove.
6. When you are finished, click **Save**.



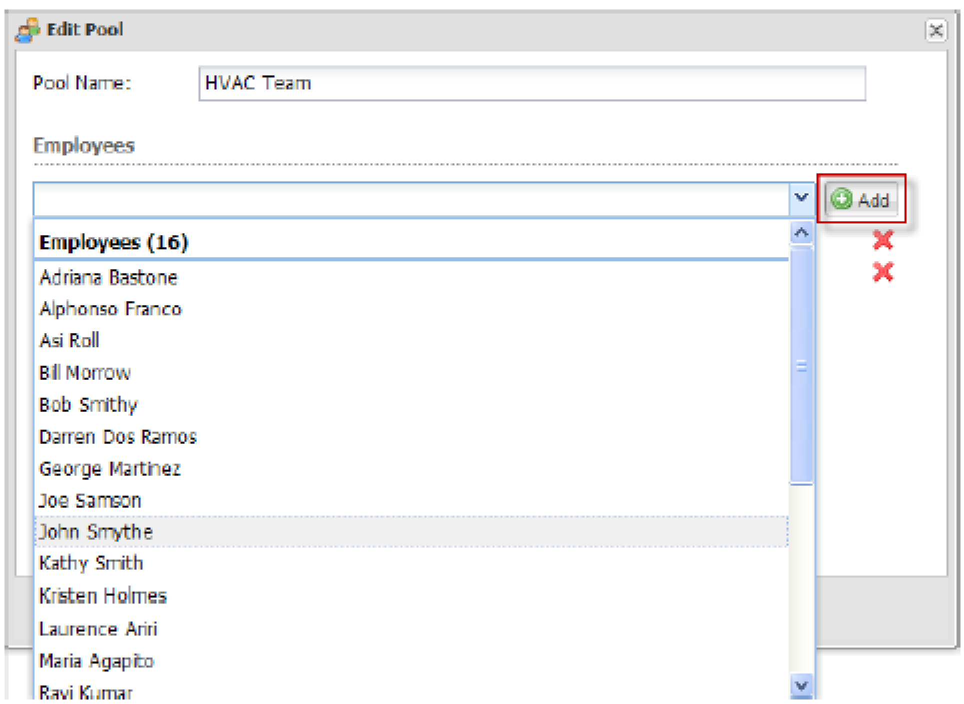
Editing Pools

1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*

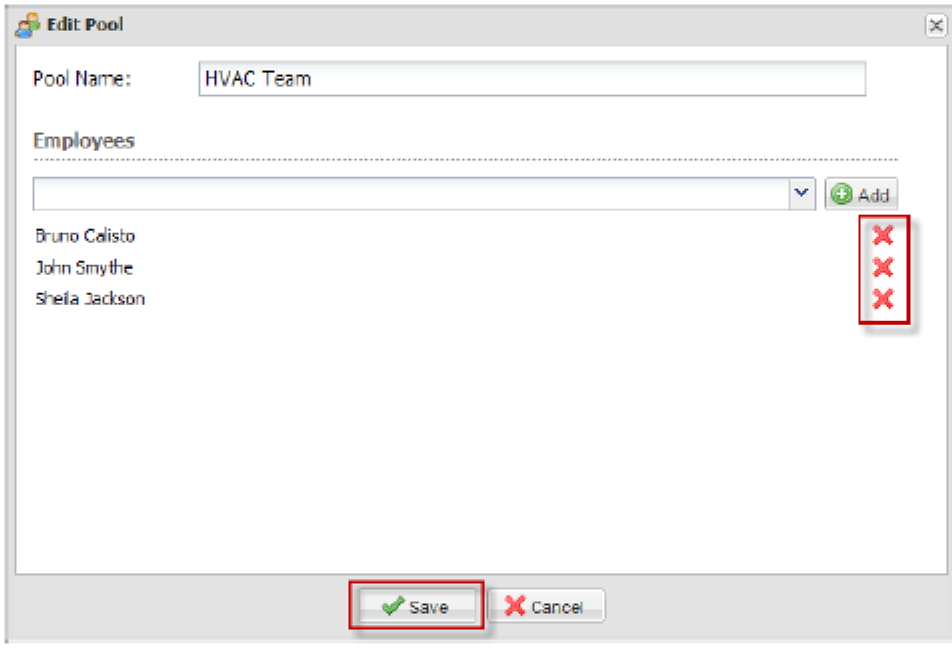
2. Under the **Pools** tab, select the Pool you would like to modify, then click **Edit**. The Edit Pool configuration window will open.



3. Edit the pool name if required.
4. To add more people to the pool, use the drop-down menu to select an employee, then click **Add**. Repeat this step until you are finished adding employees.

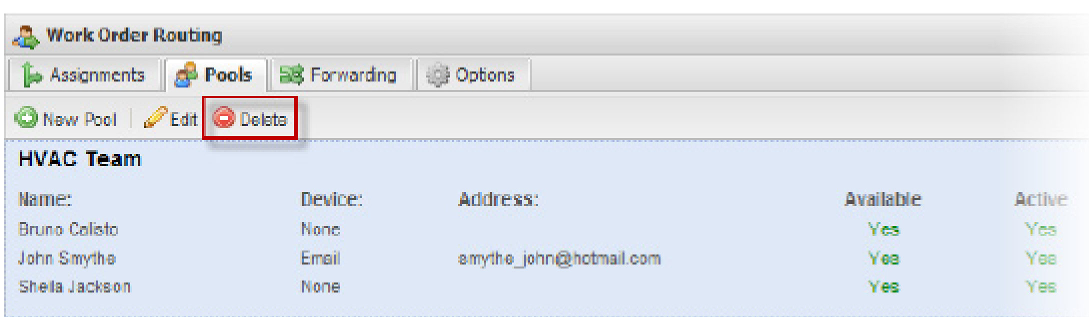


5. You can remove employees from the list by clicking **X** beside the employees you would like to remove.
6. When you are finished, click **Save**.

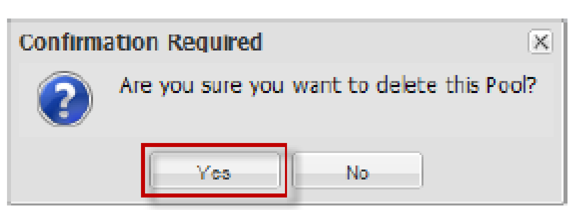


Deleting Pools

1. Click *Control Panel > Building Services > Tenant Requests > Work Order Routing*
2. Under the **Pools** tab, select the Pool you would like to remove and click **Delete**. A confirmation window will open.



3. In the confirmation window, click **Yes**. The Pool has now been deleted.



Escalation

Control Panel > Building Services > Tenant Requests > Escalation Setup

About Escalations

Escalation subscriptions must be configured for employees in order to receive escalation notices (Contact Axis Portal Support to set up escalation subscriptions). These alerts can serve as a reminder of work that has not started or completed. For example, if a work order is not started within the required time, an email can be automatically sent to any employee to notify them that the work order is idle. This tool can be helpful when there are many work orders to manage as it ensures that they do not get overlooked.

Escalation alerts can also be sent when work is not completed within a specific time frame. The length of time before escalation alerts are dispatched can be configured for each request type on the Escalation page. These alerts can be customized and are not interdependent. (I.e. Any combination of escalation alerts can be used or they may not be used at all.)

Escalation time accumulates only during the property's coverage hours. Escalation times are re-calculated whenever the work order is updated.

Note:

- The escalation feature is designed to help manage Work Orders and to help ensure that they are not overlooked. This feature is not intended to be a tool to watch over employees and the times entered should be within reason.

Escalation Alert Configuration

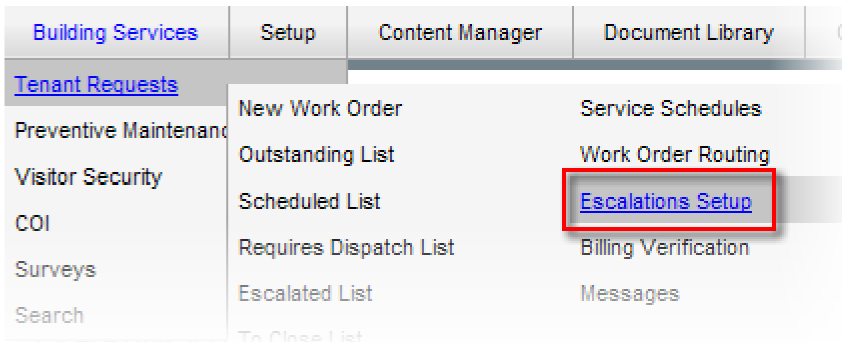
For each Request Type in each Property, three Escalation Alerts can be configured:

- **Level 1** Sends a notification when a work order has not reached Work Started status within a specified period of time.
- **Level 2** Sends a notification when a work order has not reached Work Started status within a specified period of time.
- **Level 3** Sends a notification when a work order has not reached Work Completed status within a specified period of time.

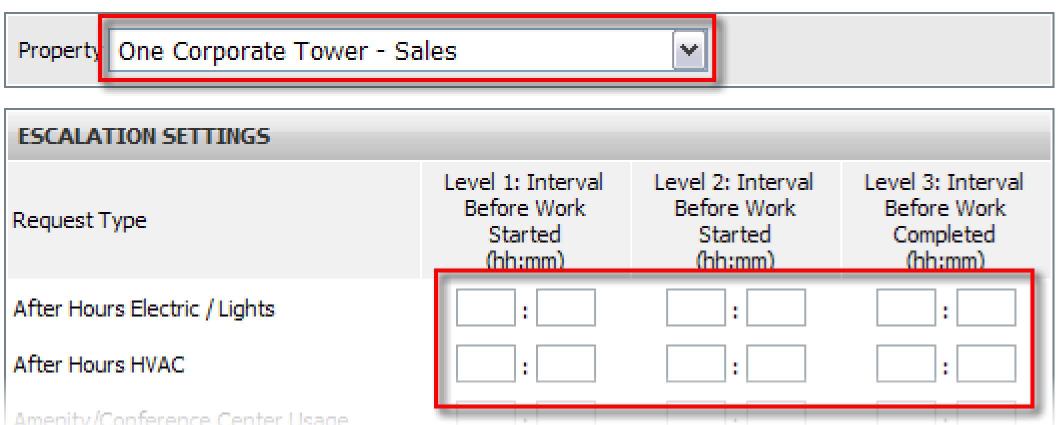
For more information, see the topic Setting up Escalation.

Setting up Escalation

1. Click *Control Panel > Building Services > Tenant Requests > Escalation Setup*



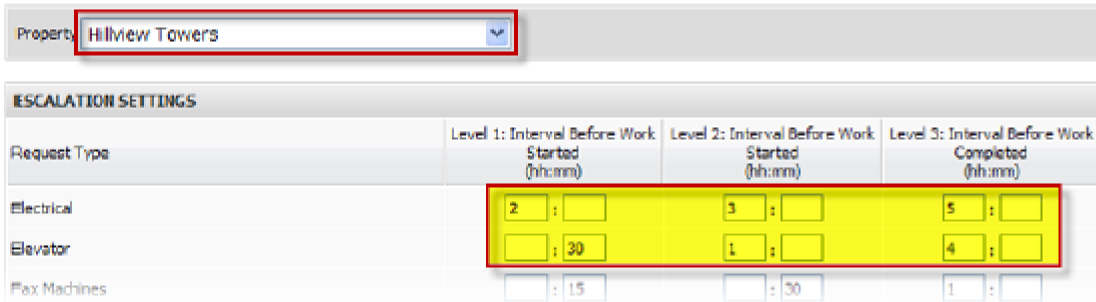
2. In the Filter section, click the **Property** field and select the desired property.
3. In the Escalation Settings section, for each desired request type, enter the times for each desired level of escalation.



4. When you are finished, click **Update** at the bottom of the escalation settings page.

Cancelling Escalation

1. Click *Control Panel > Building Services > Tenant Requests > Escalation Setup*
2. In the Filter section, click the **Property** field and select the desired property.
3. Delete the times under each escalation level for the affected request types.



4. When you are finished, click **Update** at the bottom of the escalation settings page.

Using Tenant Request

Control Panel > Building Services > Tenant Requests

About Tenant Requests

The Tenant Request module allows users to record work order requests, indicating the location of the work that needs to be done, and by whom the work was requested – either by a tenant, an employee, or an employee on behalf of a tenant. All requests are displayed in your Axis Portal as work orders, which are in turn dispatched to tradespeople, who may be either employees or vendors.

Requests are entered into you Axis Portal™ either electronically via e-mail from the tenant, through a configured Tenant Services Interface (TSI) or Tenant Portal, or are entered directly by Administrative or Call Center staff on behalf of the tenant.

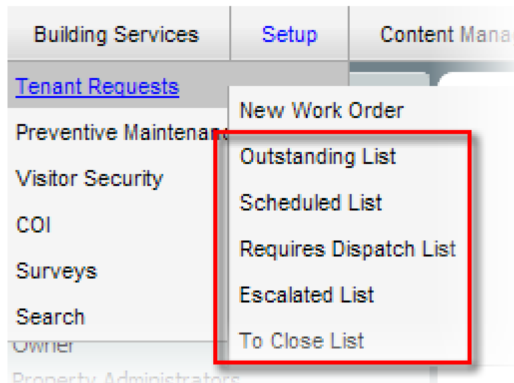
Axis Portal™ automates Work Order Routing for electronically submitted Tenant Requests. When a new Tenant Request is received by the system, Axis Portal™ will attempt to find an Employee or Vendor for the stated Request Type in the current shift. If a tradesperson can be found, a Work Order is automatically assigned and dispatched to that tradesperson.

If no tradesperson can be found, a work order is still generated, but will be placed in the Requires Dispatch and Outstanding Lists. Administrative or Call Center staff can process the work order from there by assigning and dispatching the work order to an employee or vendor.

Tenant Request Lists

Control Panel > Building Services > Tenant Requests

The TR lists can be accessed in Axis Portal by clicking on **Building Services**, then clicking on a specific TR list as shown below.



Each TR list displays work orders which fall under a specific classification or state in the work order life cycle, as follows:

- **Outstanding**

  The Outstanding list provides a general overview of all work orders that are currently outstanding and have not yet been completed. Please note that the Requires Dispatch, Escalated, and Estimates lists are subsets of the Outstanding list; depending on the specific status of a work order, a work order in the outstanding list may also appear in one of these other lists.

- **Scheduled**

  The Scheduled list displays all TR work orders where the Required date is set in the future.

- **Requires Dispatch**

  The Requires Dispatch list contains work orders which need to be dispatched; work orders in this list may also require assignment before they can be dispatched.

- **Escalated**

  This list displays all work orders that have escalated.

- **Estimates**

  This list displays work orders which either require an estimate, or have an estimate attached to them.

- **To Close**

  The To Close list displays all work orders where work has been completed but have not yet been closed. This list also includes a **Pending Invoice** column, which can be used to sort the list and group together work orders with a pending invoice.

- **Billing Verification**

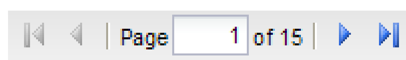
  All work orders which require billing verification are displayed in this list.

List Controls

Additional controls are located at the bottom of each list, as shown below:

Page Controls

Lists are paginated; when there are more work orders in the list than can be shown on a single page, the **Page** controls allow you to switch between pages in the list.

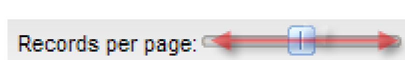


There are three ways to navigate between pages:

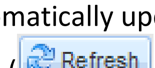
1. Type a page number into the **Page** field, then press [Enter] on your keyboard.
2. Use the  and  buttons to go directly to the first or last page, respectively.
3. Use the  and  buttons to go to the next or previous page, respectively.

Records per Page

You can adjust the number of work orders displayed on each page by adjusting the records per page slide. You can display between 20 and 100 records per page.

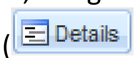


Refresh Button

All TR lists automatically update themselves every 90 seconds; however, you can also use the **Refresh** button (

) to manually update the list at any time.

Details Button

By default, all lists show additional information for each work order entry on a list, such as Actions Required, Assigned To and Location. You can hide or show this information by clicking the **Details** button (

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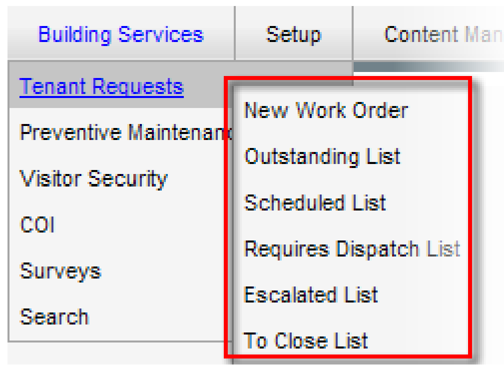
Adding a TR Work Order

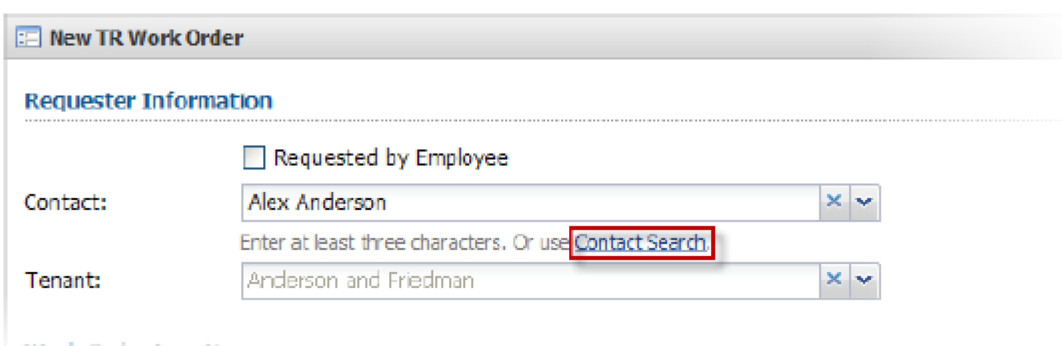
1. Click *Control Panel > Building Services > Tenant Requests > New Work Order* or the (

) button from any of the applicable TR Lists as seen below.



2. The New TR Work Order screen is displayed.

3. If you do not have call center mode enabled but would like to use the Contact Search interface, click **Contact Search** (otherwise, proceed to Step 6). If you have call centre mode enabled, you will be taken to the Contact Search screen first, as described in Step 4.



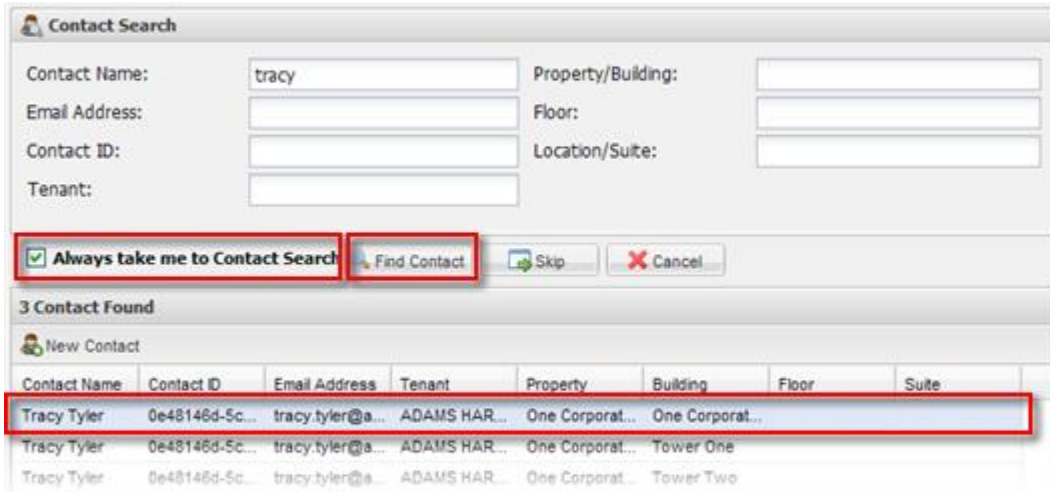
4. If you have call center mode enabled, you will be taken directly to the contact search screen. To locate a contact, fill one or more of the provided fields and click **Find Contact**. Next, double-click a contact in the Contacts Found section to proceed to the next step. If the contact's name is already known, you can optionally click **Skip** and proceed to the next step.

    - You can also enable or disable Call Centre mode by checking or unchecking **Always take me to Contact Search first** on this screen.

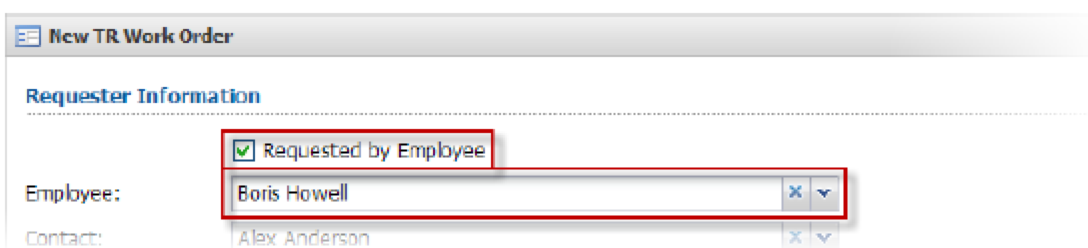
Note:

- You must enter at least 3 characters in to one of the following fields: Contact Name, Email Address or Contact ID. All other fields are optional.

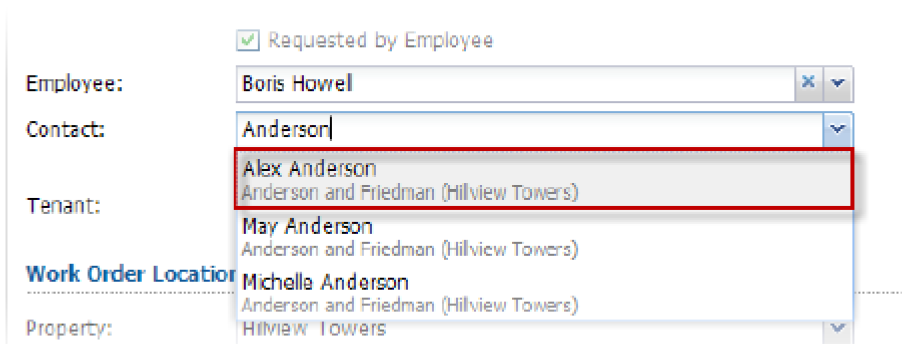
5. Once you have double-clicked on a contact, or if you do not have call center mode enabled, you will be taken to the New TR Work Order screen.



6. If the Work Order has been proactively reported by an employee, click **Requested by employee**, then click on the drop-down menu and select the employee.

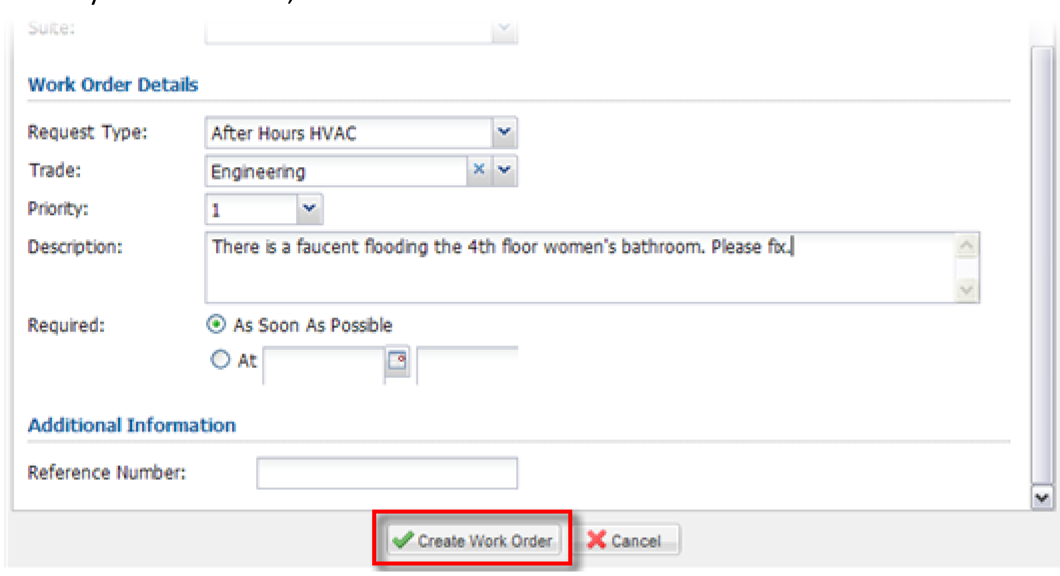


7. Click the contact field, and enter the contact's name (this information will already be filled in if you made use of the Contact Search screen described above). After entering at least three letters of the contact's name, you will be presented with a drop-down list of possible matches. Select the appropriate contact from the list.



8. Once a contact has been selected, the Tenant and Work Order Location fields are automatically filled in. If needed, the work order location can be overridden by using the drop-down menus provided.

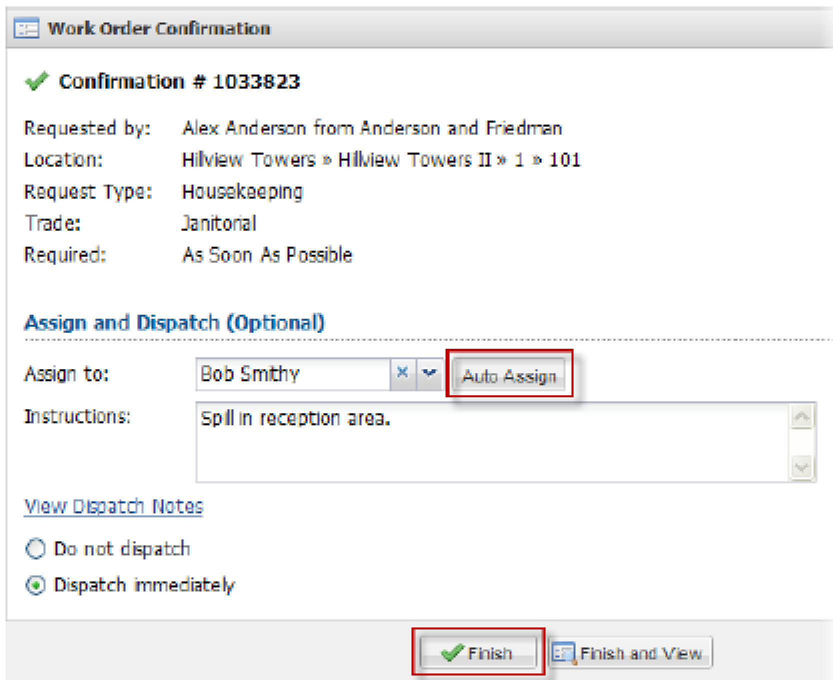
9. Next, scroll down to the Work Order Details section.
10. Using the fields provided, select a **Request Type**, **Trade** and **Priority**.
11. Next, fill in a description for the work order.
12. In the Required section, select either **As Soon as Possible** or **At** and use the menus provided to select a date and time that the work is required.
13. When you are finished, click **Create Work Order**.



14. The Work Order Confirmation screen is displayed. This contains a summary of all information entered.
15. You can assign the work order from this screen either by selecting an employee from the drop-down list, or by clicking **Auto-Assign**. The auto-assign feature will attempt to assign the work order based on your routing table.
16. If there are any dispatch notes, they will be listed beneath the Instructions field.
17. Depending on when the work was required, you will have the following dispatch options to choose from:
    - If the work order is required immediately, you can select either **Do not dispatch** or **Dispatch immediately**.

- If the work order is required at a future date, you can select either to dispatch the work order a certain number of days and hours in advance, or to dispatch immediately.

18. Click **Finish** to complete the process and return to the work order lists, or **Finish and View** to instead display the newly-created work order.



Finding TR Work Orders

Tenant Request Work Orders are displayed in the Tenant Request folders found under **Home**.

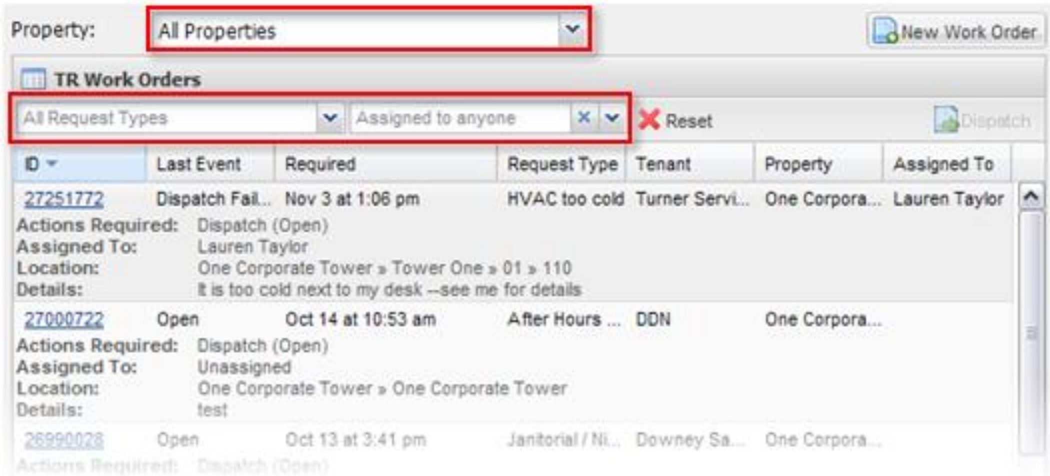
Each list in the Tenant Request folder displays work orders in various states, as described below:

List	Description
Outstanding	Displays all work orders which are due but not yet completed.
Scheduled	This list shows all future-dated work orders.
Requires Dispatch	All work orders which have not yet been dispatched are displayed.
Escalated	Escalated work orders are shown.
To Close	Lists all work orders which have been completed but not yet closed.
Billing Verification	Displays the billing verification interface, allowing verification of billing for all billable work orders.

Each list can be sorted by ID, Required Date, Request Type, Tenant, Property or assignment (Assigned To). There is also an additional field in each list by which items can be sorted:

List	Additional Field
Outstanding	Last Event
Scheduled	Received
Requires Dispatch	Last Event
Escalated	Escalation Level
To Close	Last Event

It is also possible to filter lists using the **Property**, **Request Type** and **Assigned To** drop-down lists.

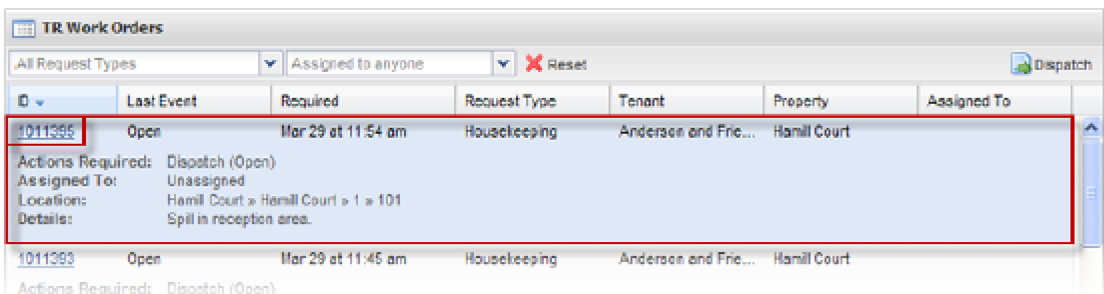

Property:
All Properties
New Work Order
TR Work Orders
All Request Types
Assigned to anyone
Reset
Dispatch
ID
Last Event
Required
Request Type
Tenant
Property
Assigned To
27251772
Dispatch Fail...
Nov 3 at 1:06 pm
HVAC too cold
Turner Servi...
One Corpora...
Lauren Taylor
Actions Required: Dispatch (Open)
Assigned To: Lauren Taylor
Location: One Corporate Tower » Tower One » 01 » 110
Details: It is too cold next to my desk --see me for details
27000722
Open
Oct 14 at 10:53 am
After Hours ...
DDN
One Corpora...
Actions Required: Dispatch (Open)
Assigned To: Unassigned
Location: One Corporate Tower » One Corporate Tower
Details: test
26990028
Open
Oct 13 at 3:41 pm
Janitorial / Ni...
Downey Sa...
One Corpora...
Actions Required: Dispatch (Open)

Updating TR Work Orders

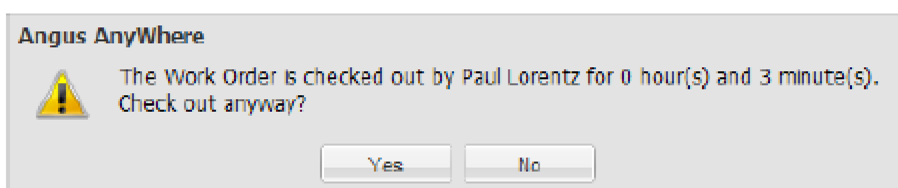
Overview

The following is a basic overview on updating the various sections of a work order. For more detailed information on editing work orders, please refer to the additional topics within this section.

1. To update a Tenant Request work order, first locate the work order you would like to update. See Finding TR Work Orders for additional details.
2. Once you have located the work order you would like to update, click on the work order number, or double-click on the work order's row.

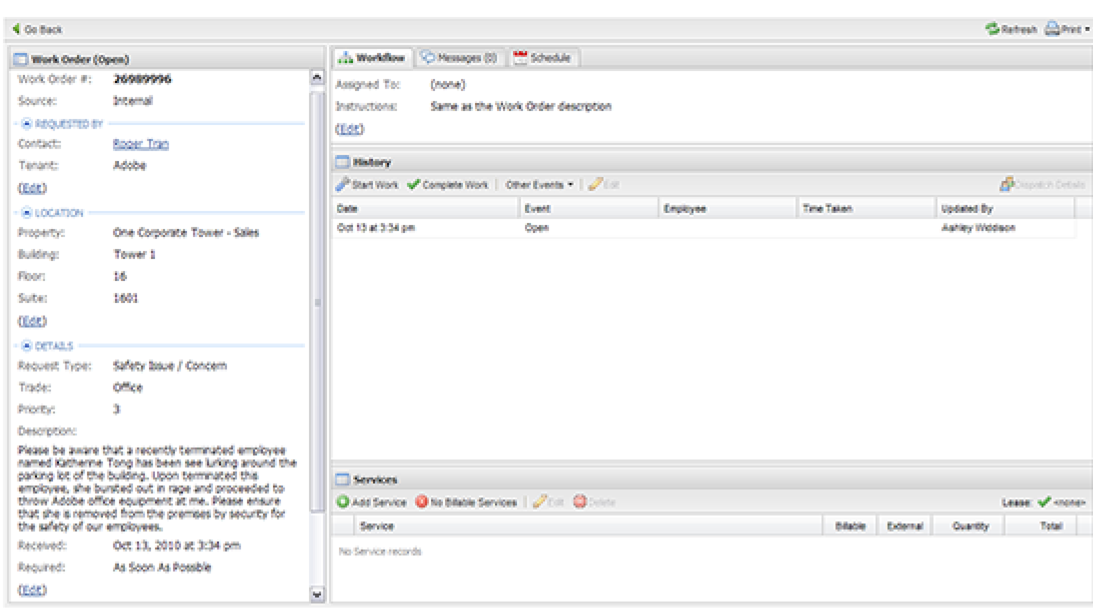


3. If another user is currently editing the work order, you will receive a warning (example below):



   If you receive this message, click **Yes** to proceed, or **No** to return to the work order list.

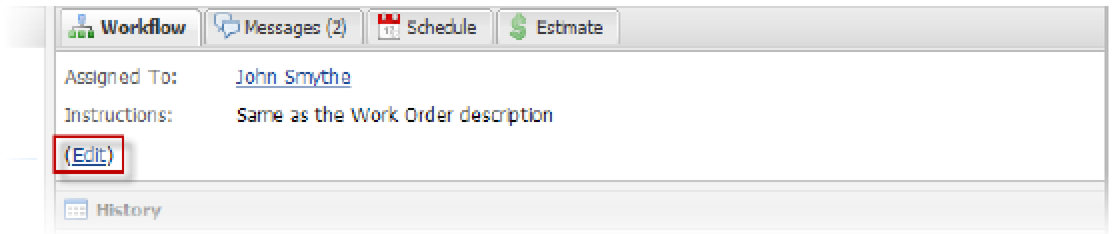
4. The work order is displayed.



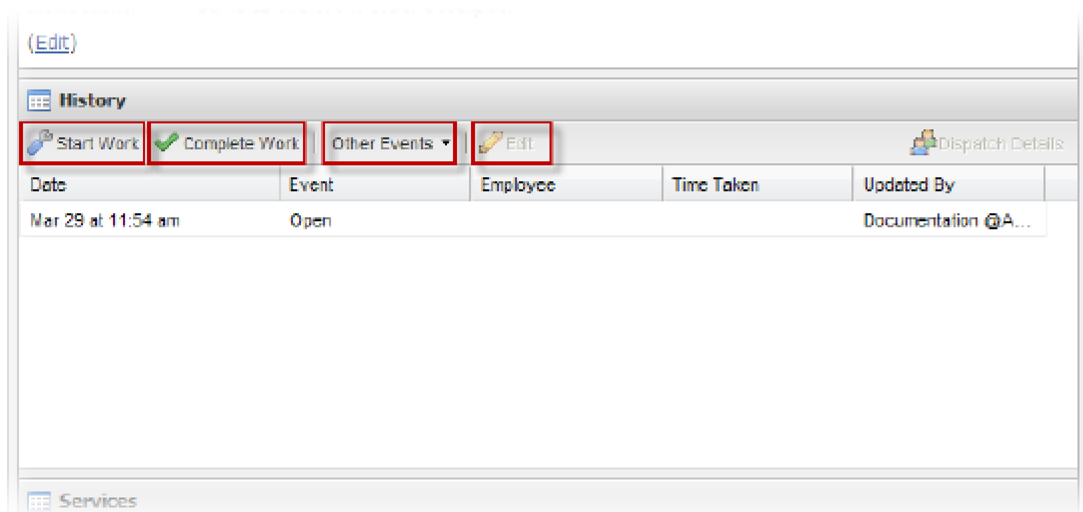
5. The **Refresh** and **Print** buttons are located in the top-right corner of the screen.
    - Selecting **Print** will print a copy of the work order.
    - Selecting **Refresh** will reload the information in the work order, displaying any changes which may have been made since the time it was originally opened (or last refreshed).

6. To the left, the work order details are displayed. To edit a section of the work order details, click on the **Edit** link which corresponds to the section of the work order details which you would like to modify.
    - Hovering your mouse pointer over the name in the **Contact** field will display a popup containing detailed contact information.

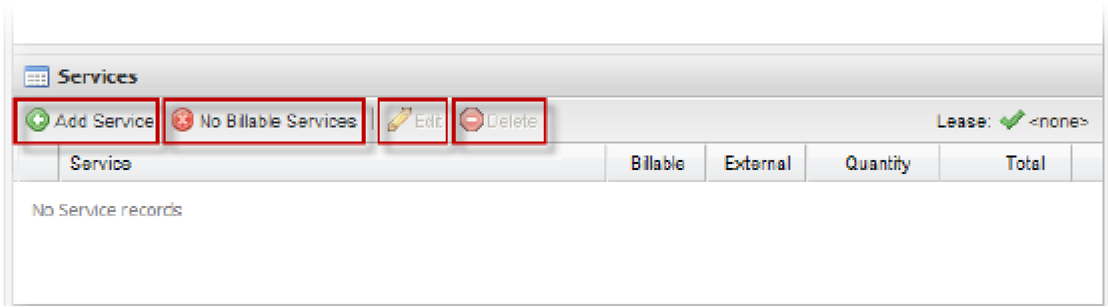
7. In the popup window that opens, modify the information as needed and click **Save**.
8. The Assign and Dispatch section is located under the **Workflow** tab to the top-right. To modify this information, click the **Edit** link.
    - Hovering your mouse pointer over the name in the **Assigned To** field will display a popup containing detailed contact information.



9. In the popup window that opens, modify the information as needed and click **Save**.
10. The History section is located below the Assign and Dispatch section. To add an event to the History section, click **Start Work**, **Complete Work**, or **Other Events**.
11. If you would like to edit an existing event, select the event and click **Edit**. Please note that not all event types can be edited.

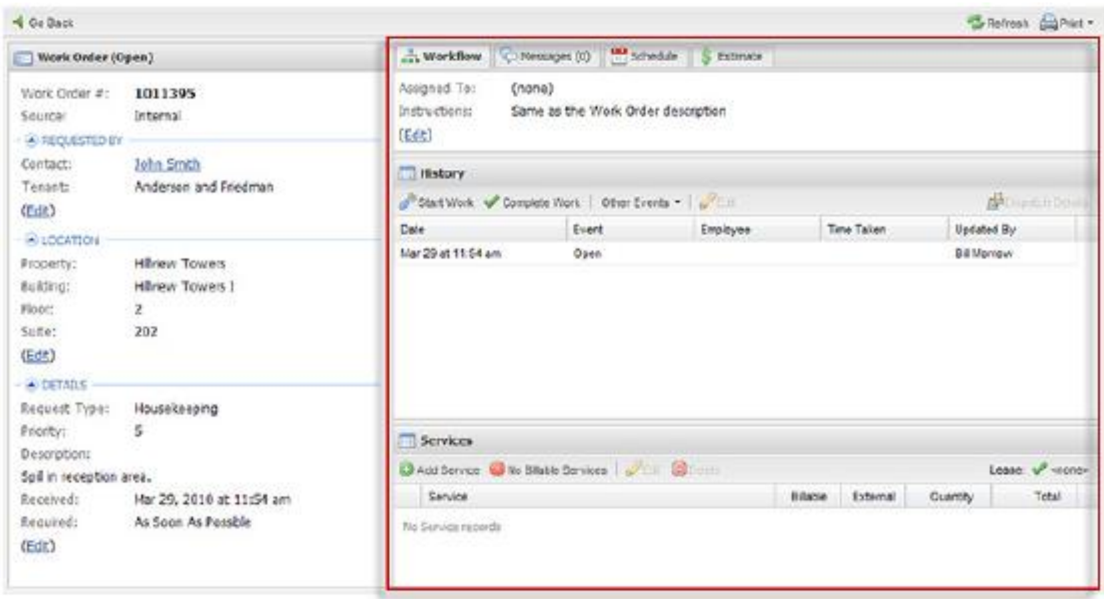


12. In the popup window that opens, fill in the event details and click **Save**.
13. The Services section is located below the History section.
    - To add a billable service, click **Add Service**. In the popup window that opens, use the fields provided to enter the service's details and click **Save**.
    - To indicate no services will be recorded, click **No Services**.
    - To modify a service that has already been added, select the service from the list, then click **Edit**. In the popup window that opens, modify the information as needed and click **Save**.
    - To delete a service that has already been added, select the service from the list, then click **Delete**.


Services
Add Service
No Billable Services
Edit
Delete
Lease: <none>
Service
Billable
External
Quantity
Total
No Service records

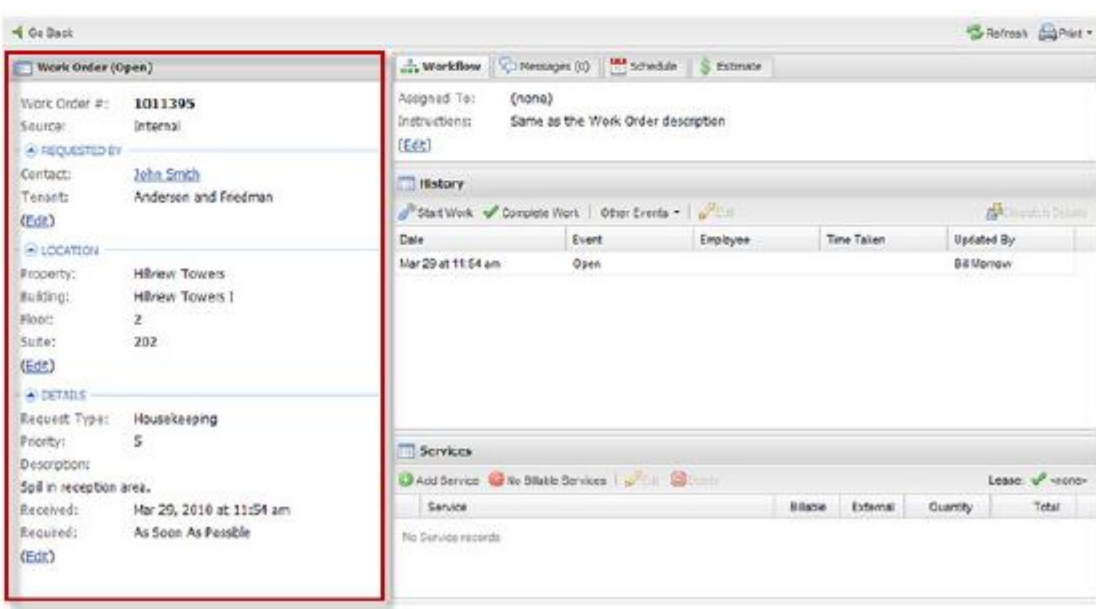
The Workflow Tab

The Workflow tab, located towards the right of the work order, displays information related to the current status of the work order. This information is divided into three sections: **Assign and Dispatch, History and Services.**

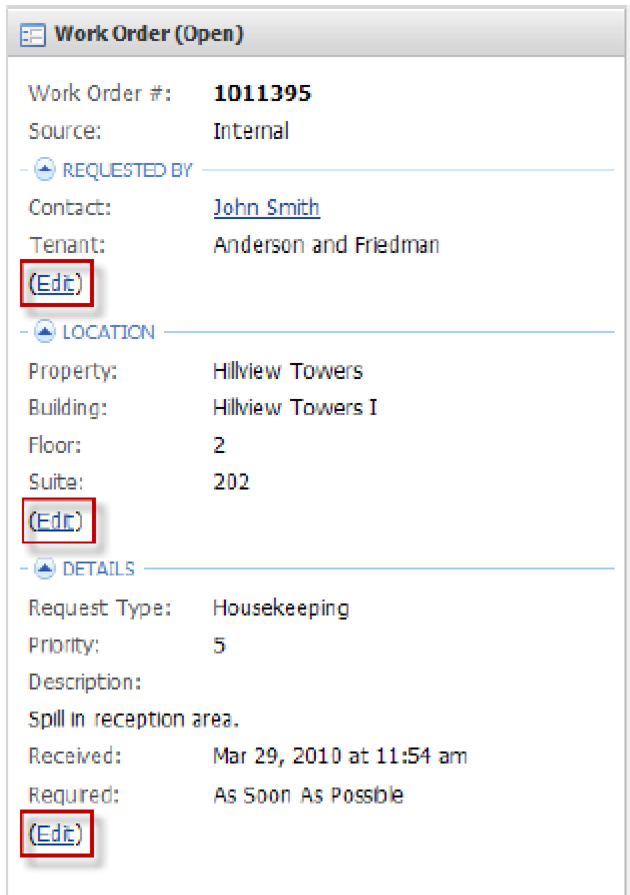


Updating Work Order Details

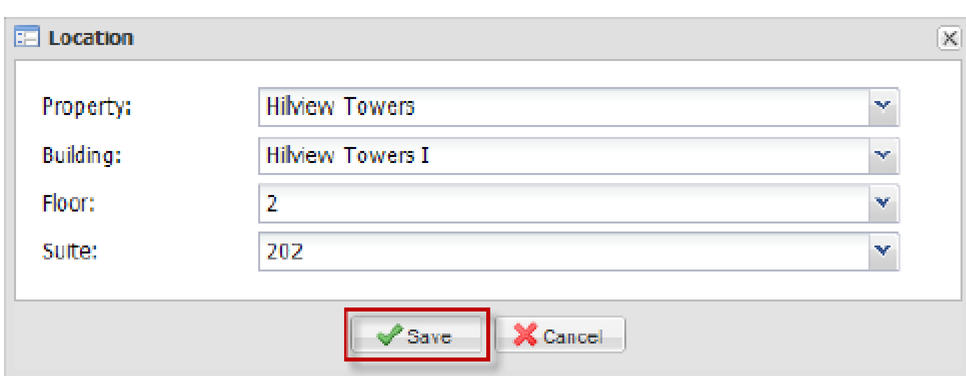
The Work Order details section is located to the left of a work order. This section contains basic information input by a tenant or employee, such as whom it was requested by, the location and details of the request.



1. To edit a section of the work order details, click on its associated **Edit** link, as highlighted below.

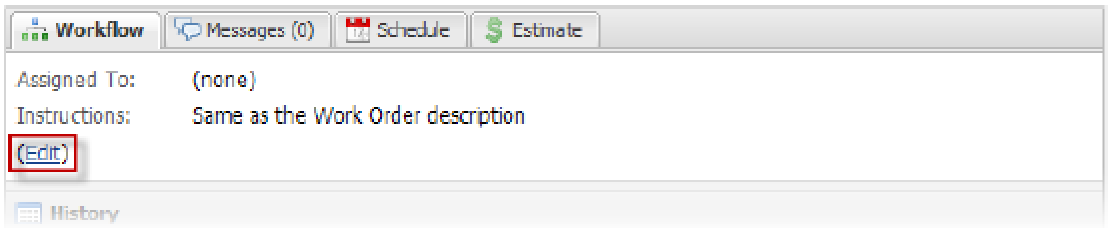


2. A popup window will open, allowing you to modify the details (the example below shows the Location popup). Modify the information as needed, then click **Save** to update the information.



The Assign and Dispatch Section

1. The Assign and Dispatch section has two fields: Assigned To and Instructions. To modify this information, click the **Edit** link. A popup window will open.

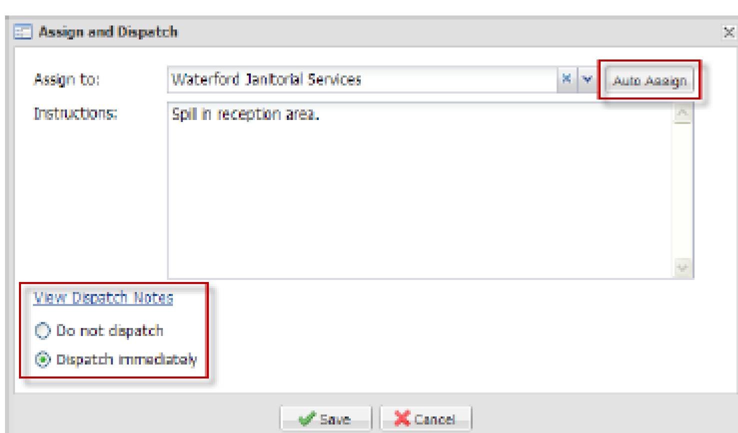


2. You can assign (or re-assign) the work order by either using the drop-down menu provided, or by clicking **Auto-Assign**. The auto-assign feature uses your routing table to determine the tradesperson or vendor that should be assigned to the work order.
3. You can also add or modify the instructions that will appear on the work order. By default, this text will be identical to the Description field in the Work Order Details section, located to the bottom-left of the work order.

Note:

- Modifying the Instructions field does not alter the Description field in the Work Order Details section.

4. The Dispatch Notes link displays any dispatch notes associated with the property or Request Type. Dispatch notes are not displayed on work orders; they are meant to help provide guidance when assigning work orders. To see the dispatch notes, move your mouse over the link; the notes will appear in a tool tip.
5. If an assignment was made **Dispatch Immediately** will be selected by default. If you want to assign the work order but not dispatch it for the moment, select **Do not dispatch**.
6. Click **Save**. If you selected **Dispatch immediately**, the work order will be dispatched.



The History Section

The History section, located under the Workflow tab, displays a chronological record of events related to the work order's status. The table below displays a list of all events which can be added to a work order's history.

Event Types (History Section)

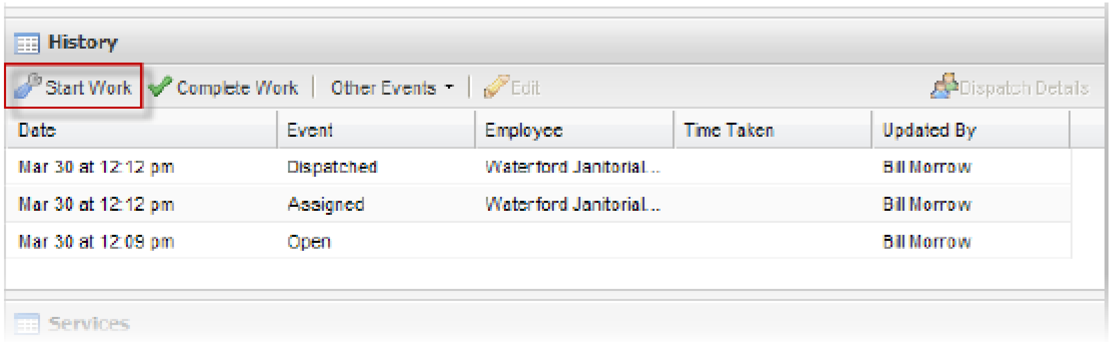
Note:

- Some events can be configured by default to trigger a tenant notification email, or can be set to do so on a case-by-case basis. For more information, see Tenant Notification Events in your Axis Portal online help.

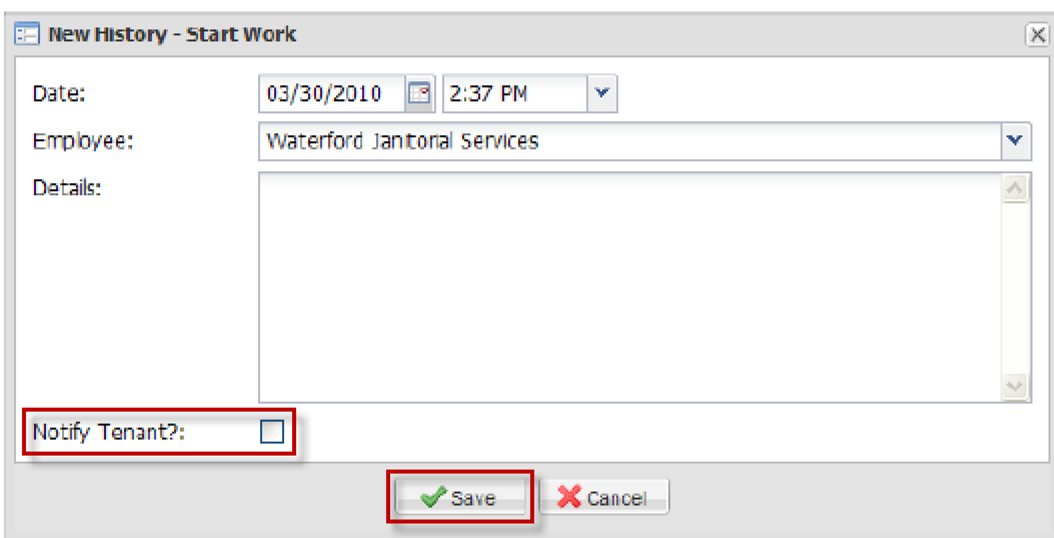
Event	Description
Open	The work order has been created, but not assigned or dispatched.
Assigned	Indicates the work order has been assigned but not dispatched.
Dispatched	The work order has been dispatched, but not yet accepted or rejected.
Dispatch Failed	The attempt to dispatch the work order could not be completed. This is often caused by misconfiguration in the tradesperson's profile in Axis Portal (missing/ incorrect device email address), or a problem with the Engineering device (loss of signal or inactive device).
Accepted	The work order has been accepted by the tradesperson.
Rejected	Indicates the work order was not accepted by the tradesperson.
Travelling	The tradesperson is en route to the site.
Delayed	Indicates that work has been delayed.
Work Started	The tradesperson is on-site and has begun work.
Work Completed	Indicates work has been completed.
Cancelled	The work order was cancelled.

Adding a Work Started Event (History Section)

1. To add a Work Started event to a work order using your Axis Portal, click **Start Work** in the History section. The New History popup is displayed.

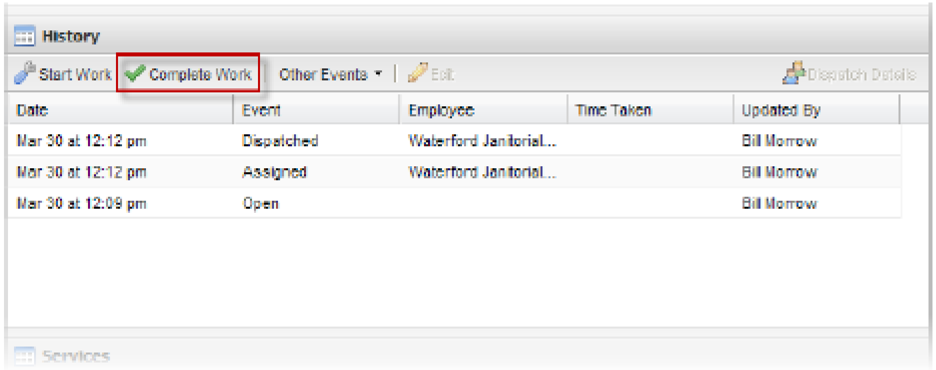


2. Using the drop-down lists provided, enter the date and time that work was started. By default, the current date and time is used.
3. You can also modify the tradesperson that is performing the work.
4. You can add any additional information in the Details section.
5. If you would like to notify the tenant that work has started, place a checkmark beside **Notify Tenant**.
6. Click **Save** to add the Work Started event.

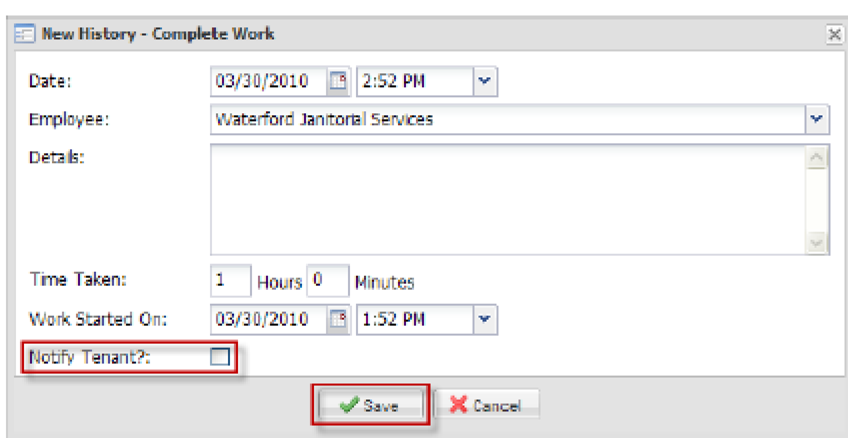


Adding a Work Completed Event (History Section)

1. To add a Work Started event to a work order using your Axis Portal, click **Complete Work** in the History section. The New History popup is displayed.



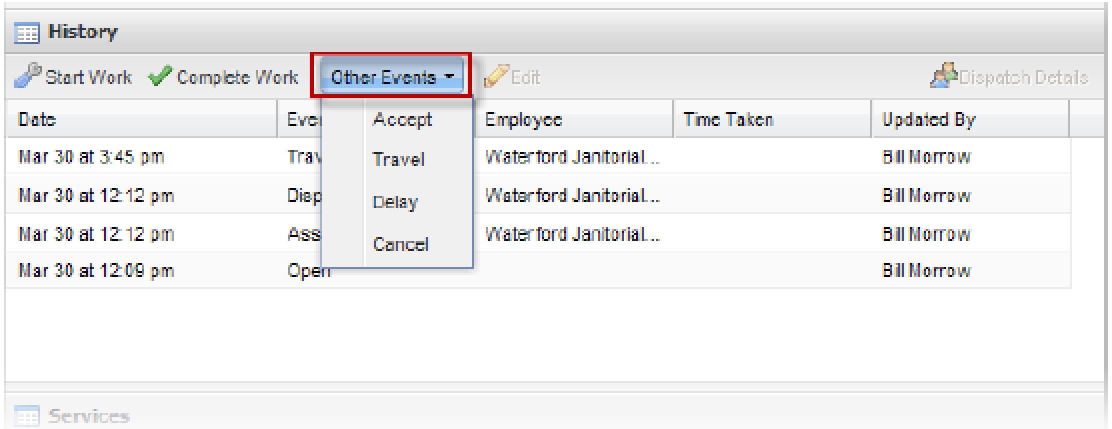
2. Enter the date and time that work was completed.
3. If necessary, you can also modify the tradesperson that completed the work.
4. You can add any additional information in the Details section.
5. Enter the Time Taken using the Hours and Minutes fields.
6. If a Work Started event was not added beforehand, a Work Started On section is available. Enter the date and time that work was started.
7. If you would like to notify the tenant that work has been completed, place a checkmark beside **Notify Tenant**.
8. Click **Save** to add the Work Completed event. If a Word Started event was not previously entered into the history, it will automatically be added; the details will be calculated using the information entered for the Work Completed event.



Adding Other Events (History Section)

Other events (Accepted, Travelling, Delayed and Cancelled) can be added by clicking the **Other Events** button and selecting an event from the drop-down list.

- When entering a **Delay** or **Cancel** event, you will have the option to notify the tenant by placing a checkmark beside **Notify Tenant**.

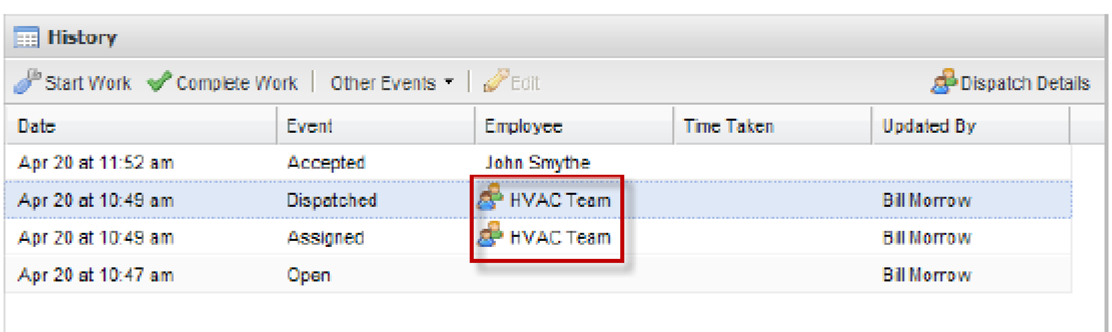


Pool Dispatch Details (History Section)

Pools are predefined groups of employees. After setting up one or more Pools, you will be able to assign work orders to Pools, either by using the routing table, or by manually assigning a specific work order to a pool.

For more information on Pool configuration, see the Pools section under Work Order Routing.

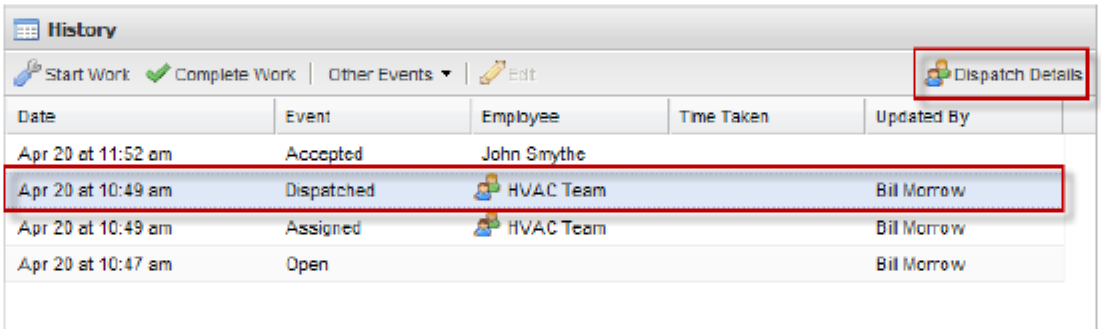
When a work order is dispatched to a Pool, the dispatch record is marked in the work order's history with a Pool icon () beside the name, as shown below:



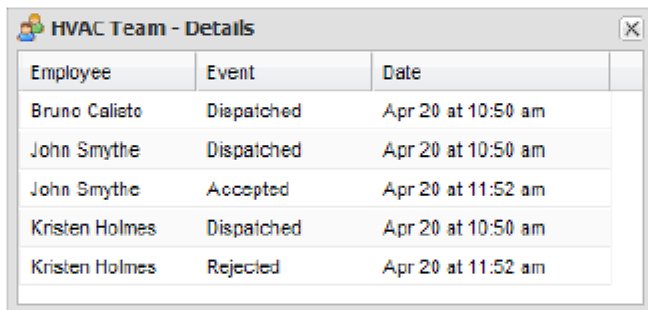
The work order history is updated as recipients within the pool respond with an ACCEPT or REJECT, as with any other work order. The first person to accept the work order is assigned to it, with the employee's name added to the history as an Accepted event, as shown above.

A detailed log of each pool member's response to the work order is also recorded. You can view this additional log as follows:

1. Click on the Dispatched event, where the work order was dispatched to a Pool.
2. Click the **Dispatch Details** button. The Details window will open.



3. The Details window displays the responses logged from each employee in the Pool. When you are done reviewing the information, click in the top-right corner to close the window.

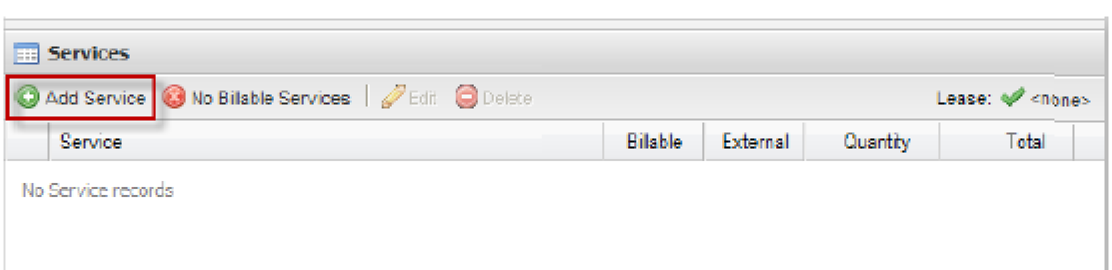


The Services Section

The Services section, located under the Workflow tab, displays a list of all services associated with a work order. Work orders cannot be closed until either at least one service is listed in this section, or it is flagged to indicate that there were no services.

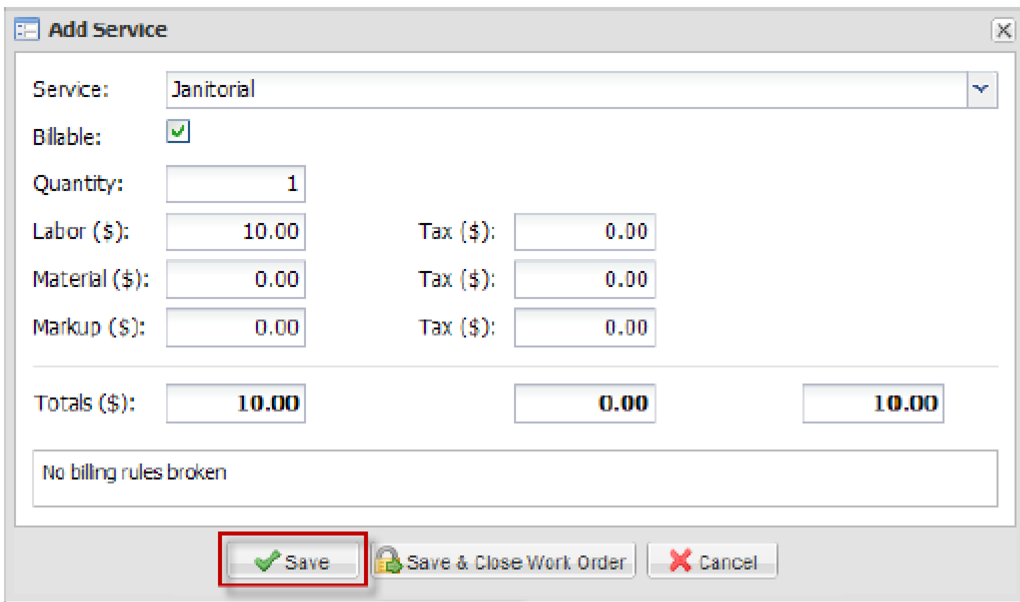
Adding a Service (Services Section)

1. To add a service to a work order, click **Add Service**. A popup window will open.



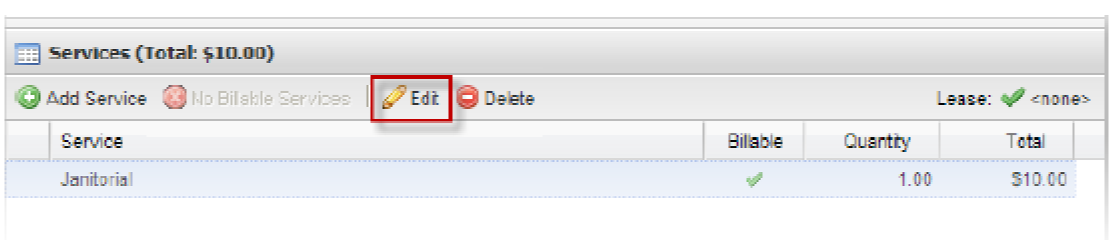
2. In the window that opens, select a service using the dropdown list provided. Please note that the service amounts are predetermined based on your service configuration. See About Service Schedules and related topics for more information.
3. If the service is billable, place a checkmark beside **Billable**.

4. Enter the Quantity in the field provided.
5. You may also optionally modify the labor, material, markup, and tax amounts for each if custom billing is required; if you have billing rules enabled, a section at the bottom of the screen will inform you if any billing rules have been broken.
6. When you are finished, click **Save** to add the service; or, if you are finished with the work order, click **Save & Close Work Order**.



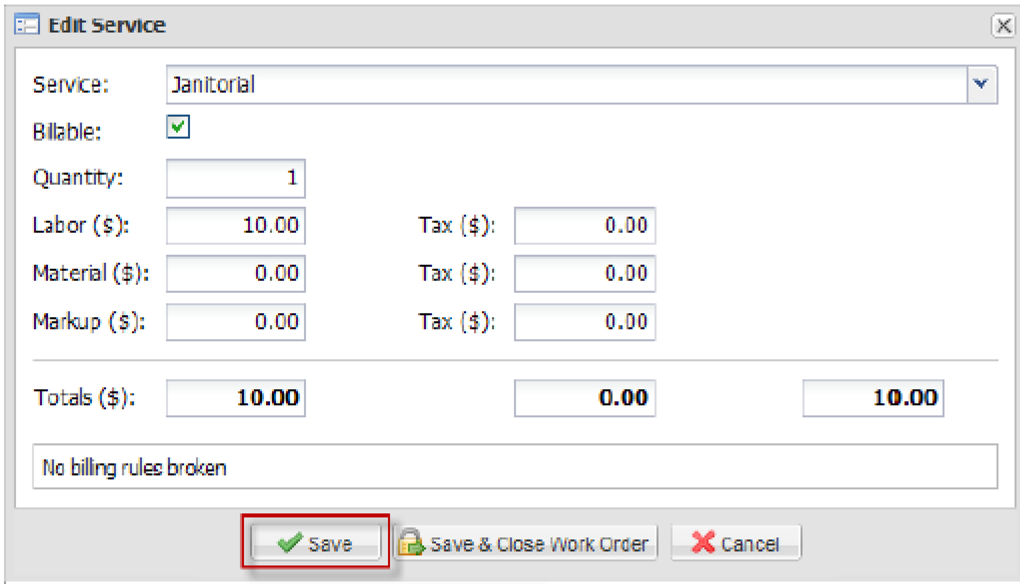
Editing a Service (Services Section)

1. To modify a service that has been added, select the service from the list and click **Edit**. A popup window will appear.



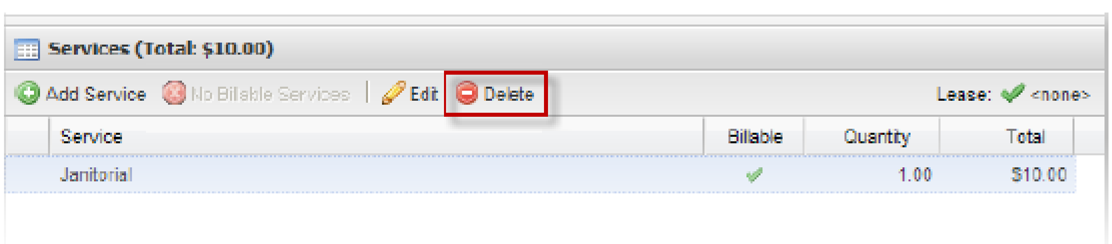
2. In the window that opens, dropdown list provided to change the service if required.
3. If the service is billable, add or remove a checkmark beside **Billable** to indicate whether the service can be billed.
4. If the service was performed multiple times, enter the Quantity in the field provided.
5. You may also optionally modify the labor, material, markup, and tax amounts for each if custom billing is required; if you have billing rules enabled, a section at the bottom of the screen will inform you if any billing rules have been broken.

6. When you are finished, click **Save** to apply your changes; or, if you are finished with the work order, click **Save & Close Work Order**.

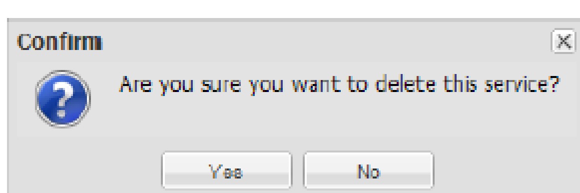


Deleting a Service (Services Section)

1. To modify a service that has been added, select the service from the list and click **Delete**. A confirmation dialogue will appear.

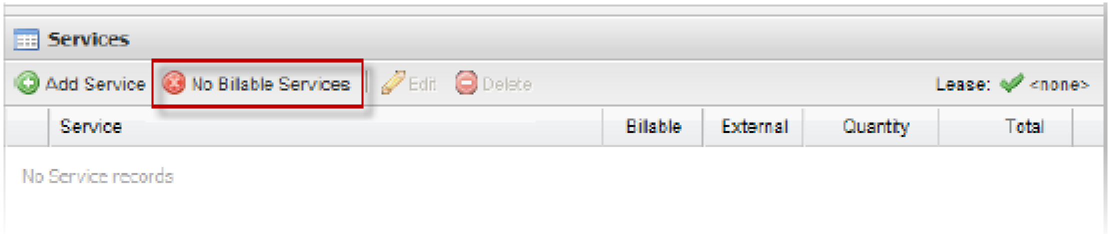


2. In the confirmation window, click **Yes**. The service is now deleted.



No Billable Services (Services Section)

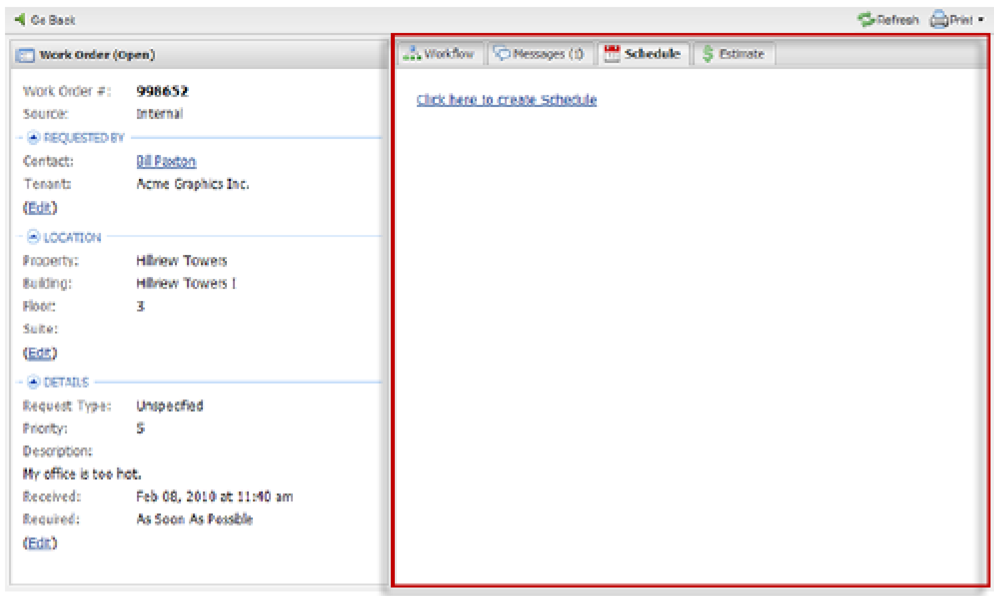
1. If no services need to be recorded, click **No Billable Services**.


Services
Add Service
No Billable Services
Edit
Delete
Lease: <none>
Service
Billable
External
Quantity
Total
No Service records

The Schedule Tab

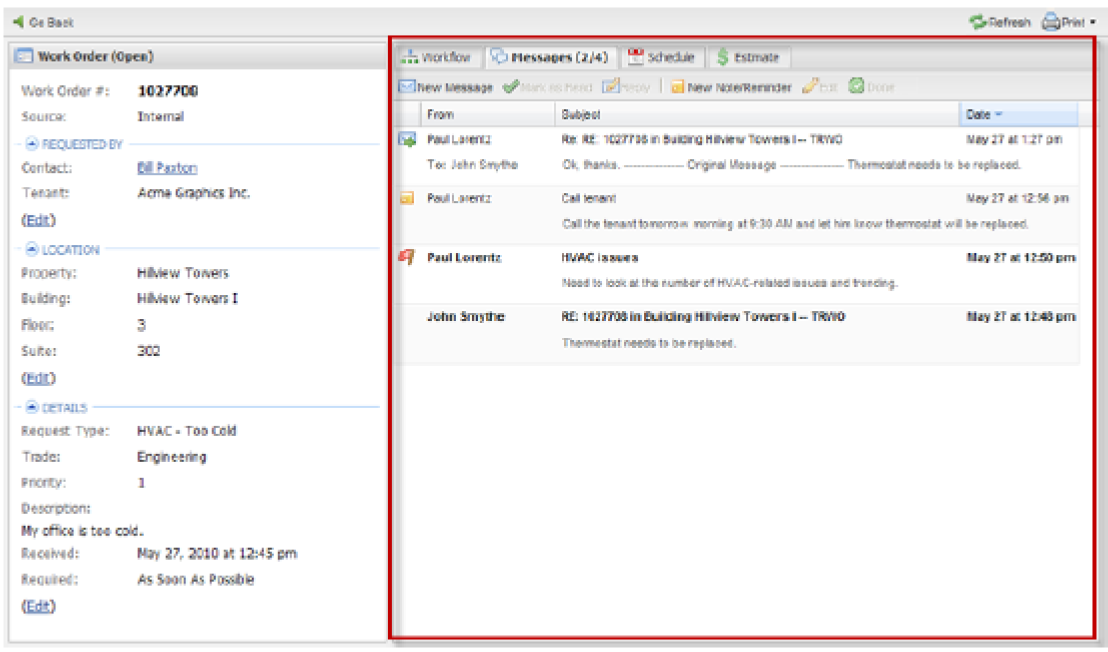
The Schedule tab allows users to quickly create a schedule based on the currently open work order, or to access an existing schedule responsible for creating the work order currently open.

For more information, please refer to the section titled Recurring Schedules.



The Messages Tab

The Messages tab, located towards the right of the work order, displays messages related to the work order.



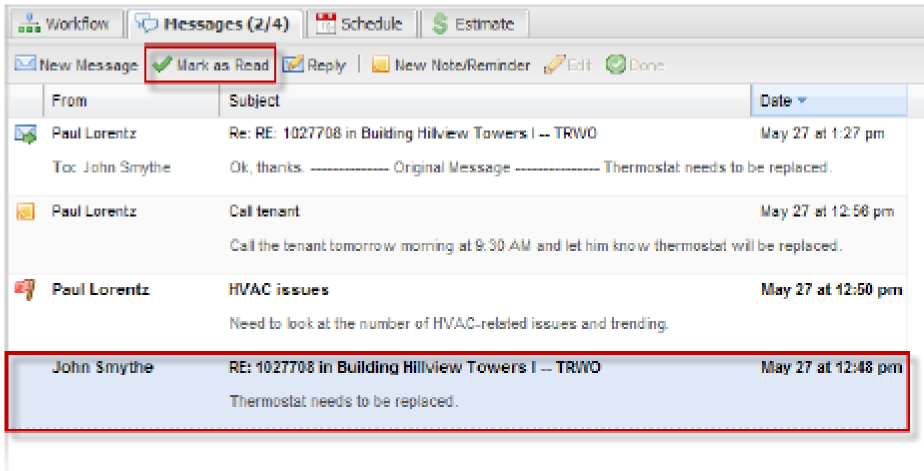
There are four different types of messages which can appear under this tab:

1. **Incoming Messages** Messages that are received by email are displayed in this interface. Messages marked in bold are unread. Unread messages also appear in the Messages list.
2. **Outgoing messages** Outgoing messages that are sent by email to one or more recipients and are tagged with an icon.
3. **Reminders** Reminders are created by Axis Portal administrators, are always displayed in bold, and are not sent to an email recipient. Reminders can be used as a high-priority "to-do" note, which will also appear on the Messages list.
4. **Notes** Notes are lower-priority reminders which are only displayed within the Messages tab of the work order they are associated with.

Marking Messages as Read or Unread

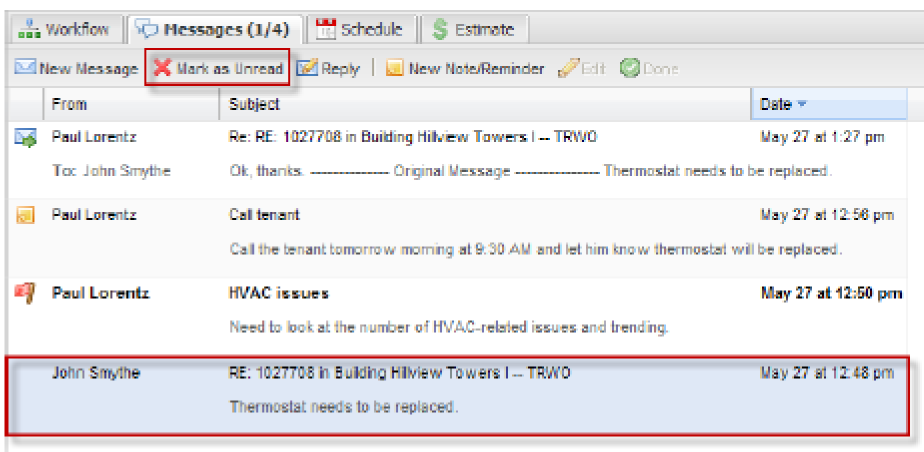
Marking Messages as Read

To mark a message as read, select the message and then click **Mark as Read**. Messages that are marked as read will no longer appear in the Messages list.



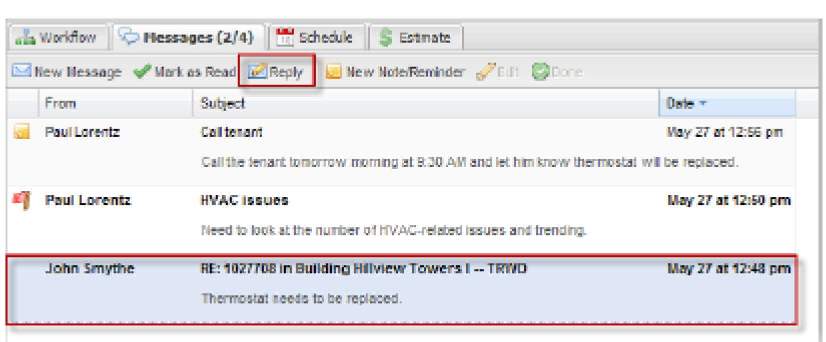
Marking Messages as Unread

To mark a message as unread, select the message and then click **Mark as Unread**. Messages that are marked as unread will appear in the Messages list.

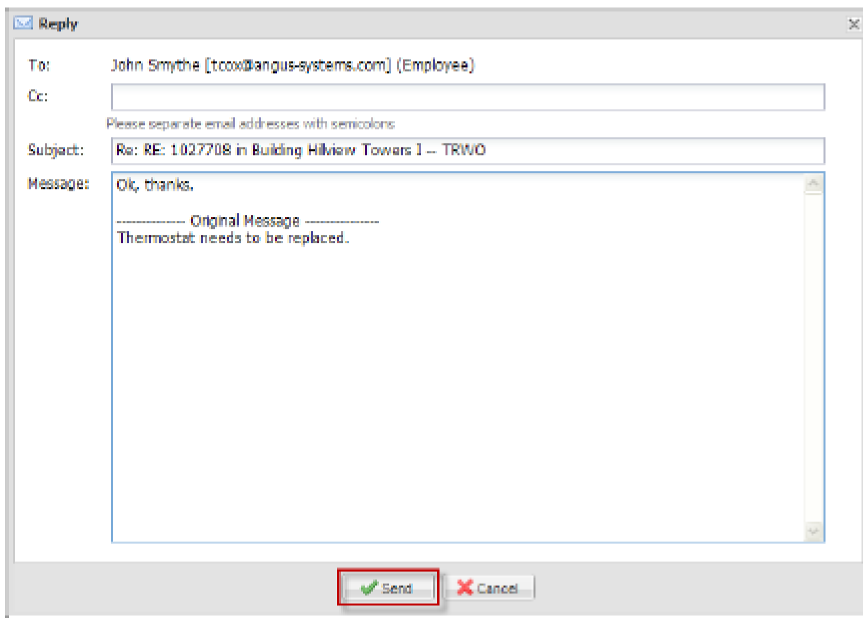


Replying to a Message

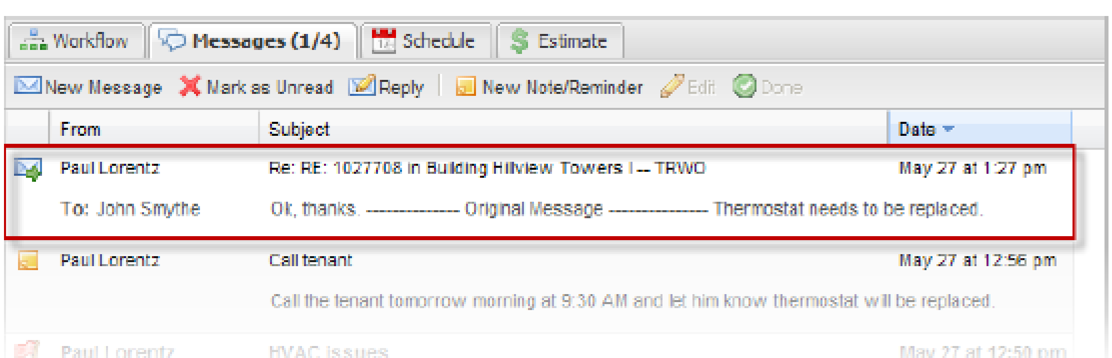
1. To reply to a message, select the message you want to respond to, then click Reply. The Reply popup window will open.



2. In the reply popup, the **To** field is auto filled. If you would like to send the message to additional recipients, you can fill in additional email addresses in the **Cc** field (separate multiple addresses with semicolons).
3. If required, you can also edit the **Subject**.
4. The original message text is included in the **Message** field. You can type in your response above the original message text or delete the original text before entering your message.
5. Click **Send**. Your message has been sent.



6. Sent messages will appear under the Messages tab. All outgoing messages are marked with a  icon.

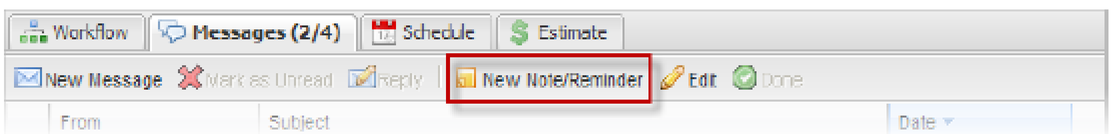


Using Reminders

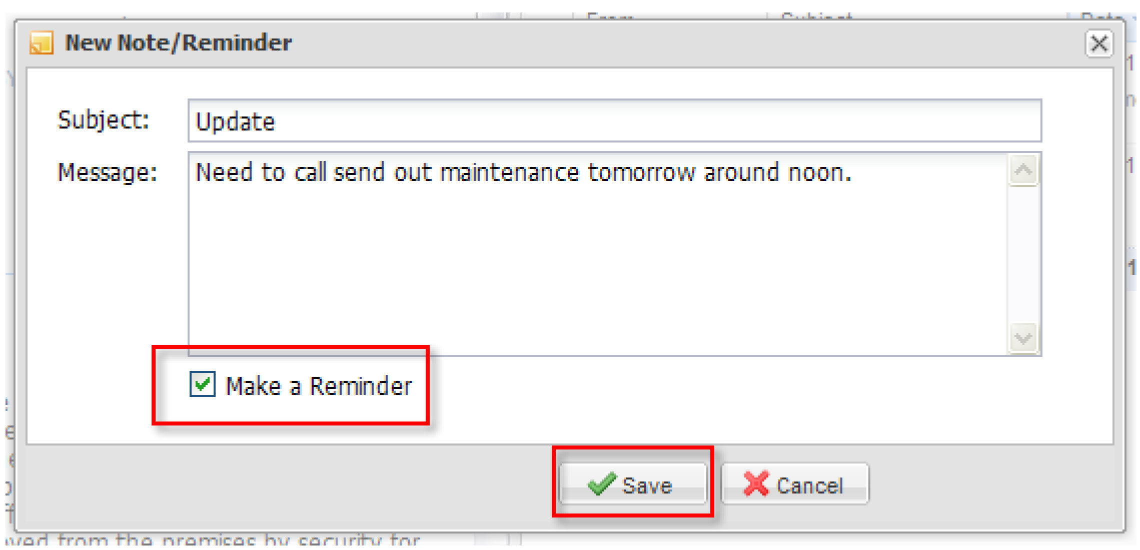
Reminders are created by Axis Portal administrators, are always displayed in bold, and are not sent to an email recipient. Reminders can be used as a high-priority "to-do" note, which will also appear on the Messages list.

Creating a New Reminder

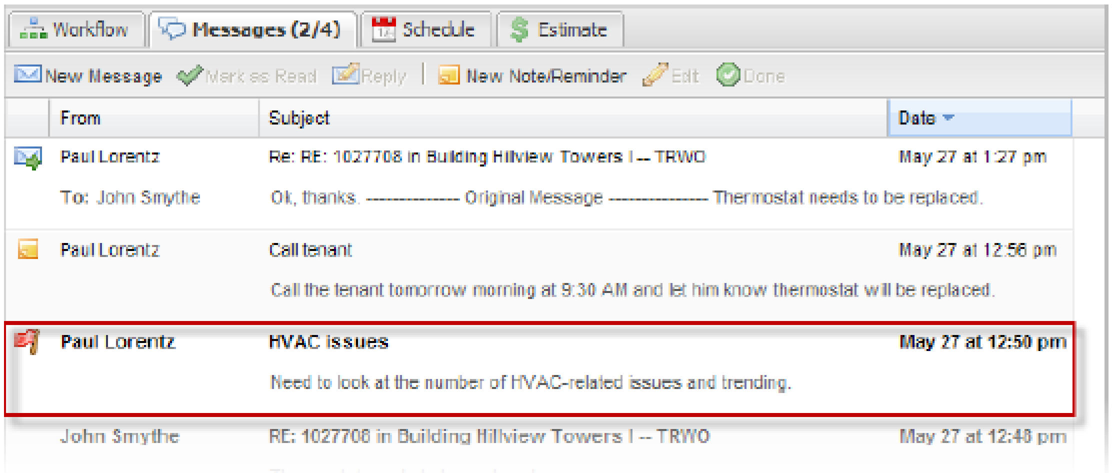
1. Click **New Note/Reminder**. The New Note/Reminder popup window will open.



2. In the window that opens, enter a subject and a message for the reminder.
3. Place a checkmark beside **Make a Reminder**.
4. Click **Save**.



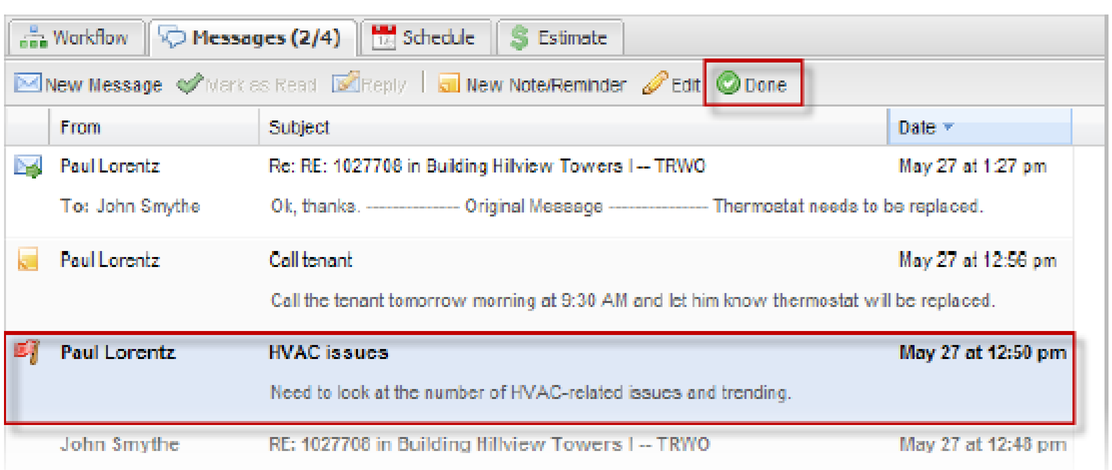
5. Your reminder will be displayed in the work order's Messages tab, as well as in the Messages list. All reminders are marked with an icon.



Dismissing a Reminder

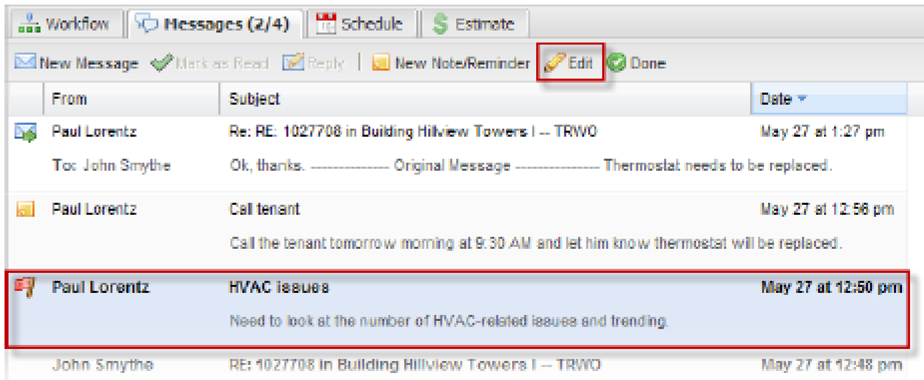
If the reminder is no longer needed, you can dismiss the reminder. Dismissing a reminder converts it into a note, which is no longer displayed in bold text and will only be displayed within the Messages tab of the work order it is associated with (i.e. it will no longer be displayed in the Messages list).

To dismiss a reminder, select the reminder from the list and click **Done**. Your reminder has now been converted into a note.

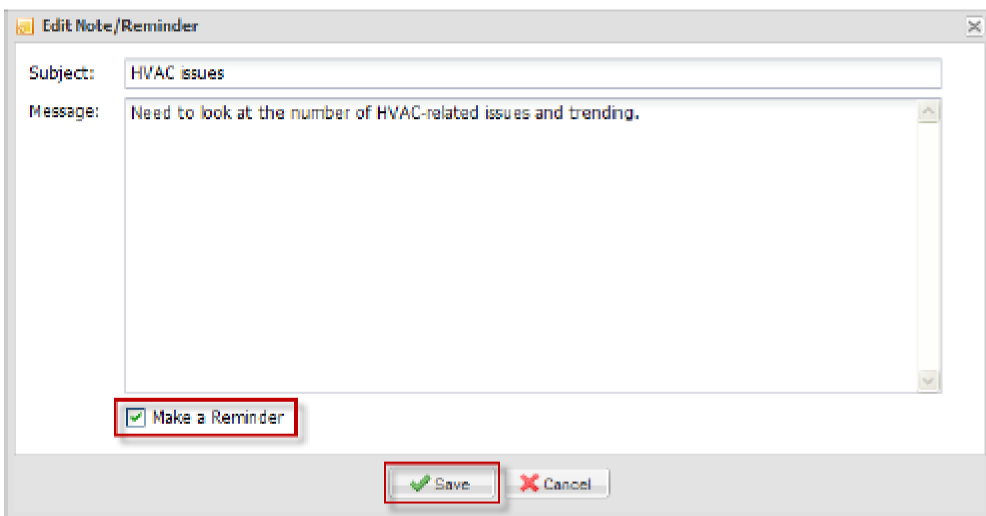


Editing a Reminder

1. To edit a reminder, select the reminder you want to modify and click **Edit**. The Edit Note/Reminder popup window will be displayed.



2. In the Edit Note/Reminder window, modify the **Subject** and **Message** field as needed.
3. If you would like to convert the reminder into a note, remove the checkmark beside **Make a Reminder**. See Using Notes for more information.
4. Click **Save** to save your changes.

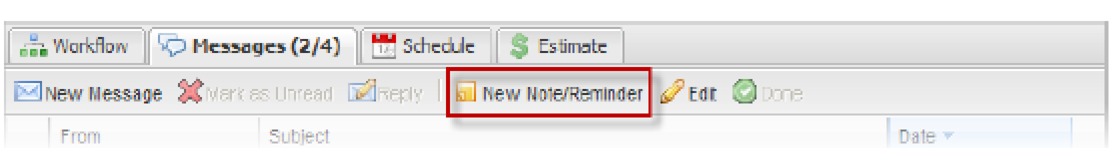


Using Notes

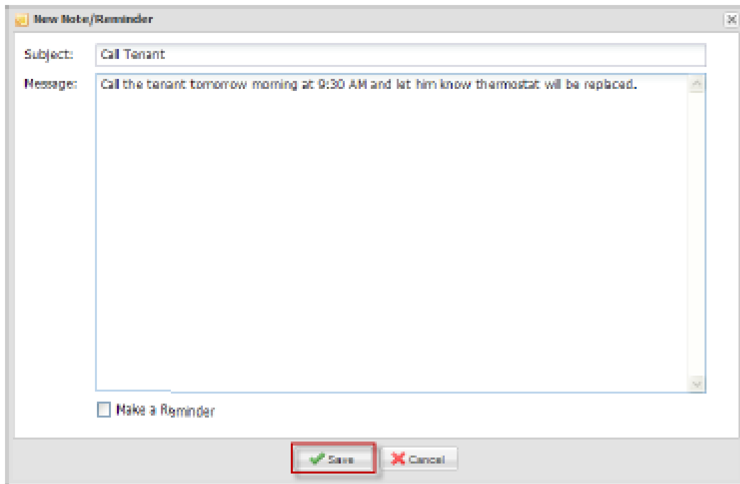
Notes are lower-priority reminders which are only displayed within the Messages tab of the work order they are associated with.

Creating a New Note

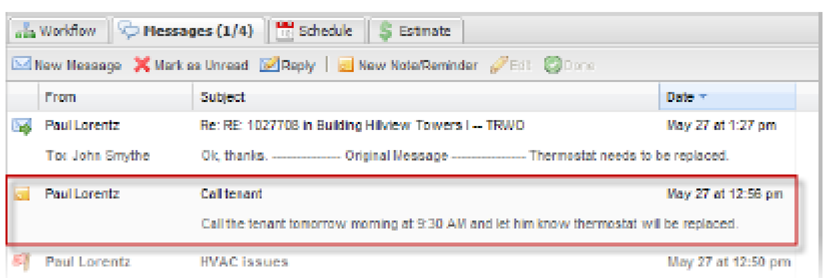
1. Click **New Note/Reminder**. The New Note/Reminder popup window will open.



2. In the window that opens, enter a subject and a message for the note.
3. Click **Save**.

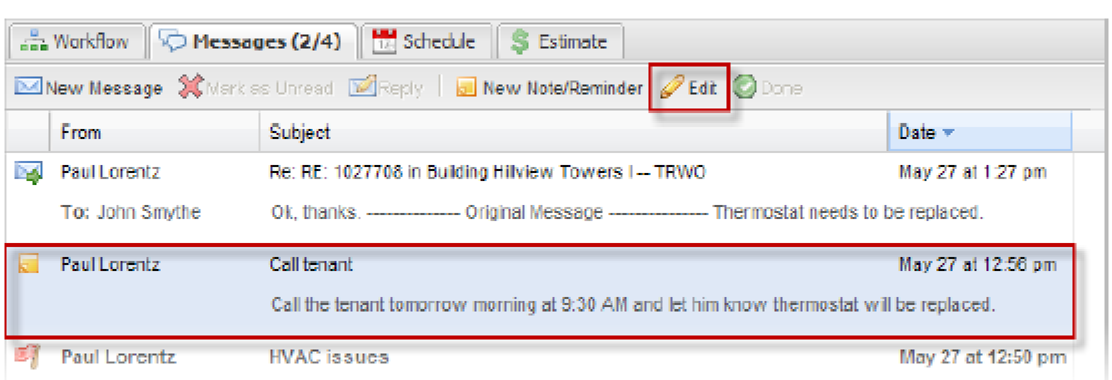


4. Your note will be displayed in the work order's Messages tab. All notes are marked with a  ion.



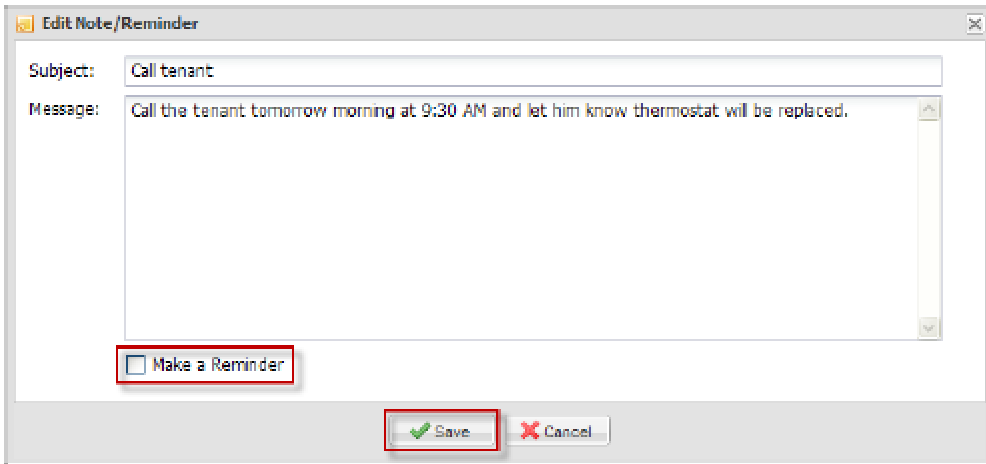
Editing a Note

1. To edit a note, select the note you want to modify and click **Edit**. The Edit Note/Reminder popup window will be displayed.



2. In the Edit Note/Reminder window, modify the **Subject** and **Message** field as needed.

3. If you would like to convert the note into a reminder, place a checkmark beside **Make a Reminder**. See Using Reminders for more information.
4. Click **Save** to save your changes.



Updating Work Orders by Email

Employees can update Work Orders via e-mail or e-mail capable device by replying to the work order message with the text displayed in the table below. This update will be reflected on the Work Order History section of the Work Order in Axis Portal.

Work Order Update	Text Code
Acknowledged **Note: If you are using the Axis Portal Tenant Request system on your handheld device, the work order will be automatically 'Acknowledged.'**	ACK
Accepted	ACCEPT
Work Started	START; WIP
Delayed	DELAY (Time Taken)
Completed	CMP (Time Taken)
Reject	REJECT
Forward	FWD (User name/ Employee First Name/ Employee Last Name)
Traveling	TRAVEL

Note:

- Messages sent using the START, DELAY and CMP codes automatically update Tenants via e-mail and on the Tenant Services Interface if one is in use. If an update to the Tenant is not desired, do not update work orders this way.

To Update Work Orders by Email:

1. Open the desired message.
2. Select the command to reply to the message (depending on the e-mail program or e-mail device you are using.)
3. Delete the body of the message.
4. Enter the text (as indicated in the table above) to update the work order.
5. Send the message.

Forwarding a Work Order

You can forward a work order by specifying either the employee's first name, last name, or login name. Examples:

FWD John
FWD Smythe
FWD jsmythe

Entering Time Taken:

Time amounts can be can be included when updating a work order with DELAY and CMP. For example, to Delay for 30 minutes, format the response as follows:

DELAY :30

Note:

- If no time is entered, a time of 0 will be entered in the Time Taken section.
- Times must contain a colon. For example, 30 minutes must be entered 0:30 or :30.

Additional Information:

Additional information about the work can also be entered. Messages with additional information will be displayed in the Work Order Message Center. For example, to delay for 30 minutes and include a reason, format the response as follows:

DELAY :30 need parts

Recurring Schedules

About Recurring Schedules

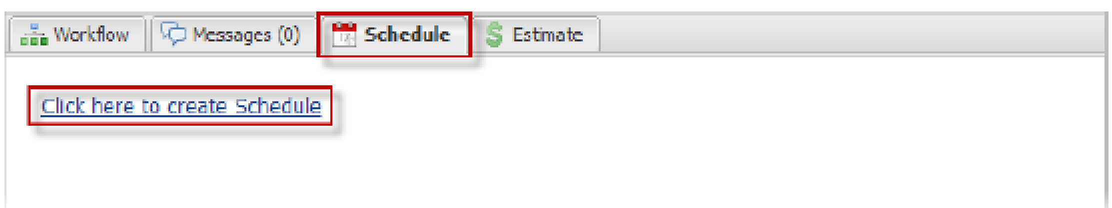
Recurring Schedules are useful when Tenants require recurring work on set days and times. Recurring Schedules can be set up to automatically generate Work Orders on pre-configured days and times. Any settings made for Work Order Routing, Escalation or Auto-Dispatch will be processed.

Recurring Schedules can be set up from Tenant Request Work Orders.

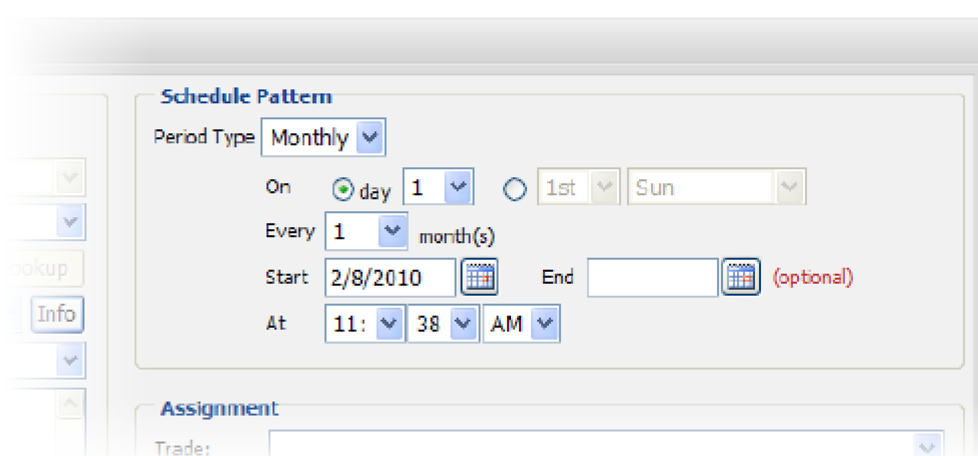
Creating a Recurring Schedule

To create a Recurring Schedule, open the Tenant Request or Work Order. See Finding Tenant Requests or Finding Work Orders for more information.

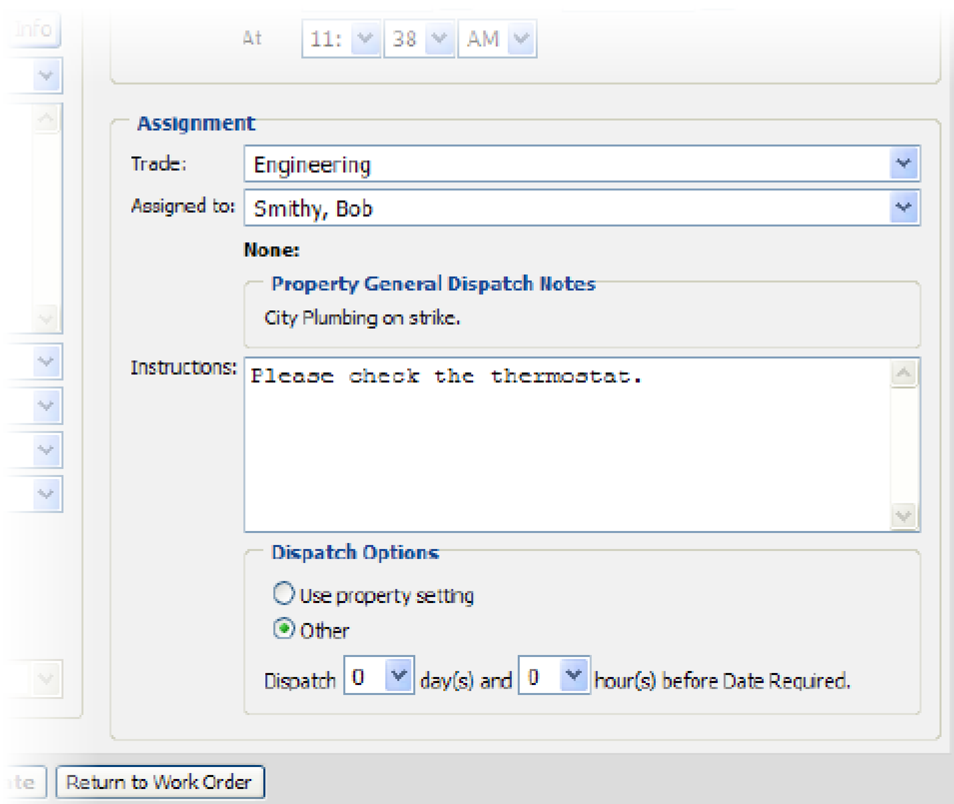
1. Click on the **Schedule** tab, then on **Click here to create Schedule**. The Schedule editor is displayed.



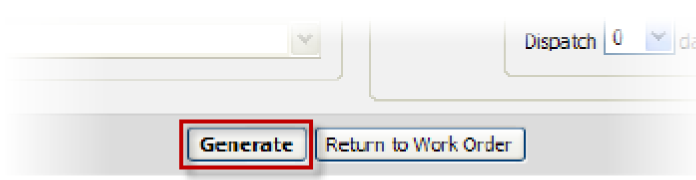
2. By default, the system enters the Request Details from the Tenant Request or Work Order. Changes can be made to this section as needed.
3. In the Schedule Pattern section, click the Period Type field and select the period.
4. Using the date/time fields provided, select the times for the schedule to be generated.



5. In the Assignment field, click the Trade field and select the trade from the drop-down list.
6. If necessary, click the Assigned To field and select the Employee from the drop-down list. Otherwise, the system will assign and dispatch the Work Orders according to the rules for the Request Type in Work Order Routing.

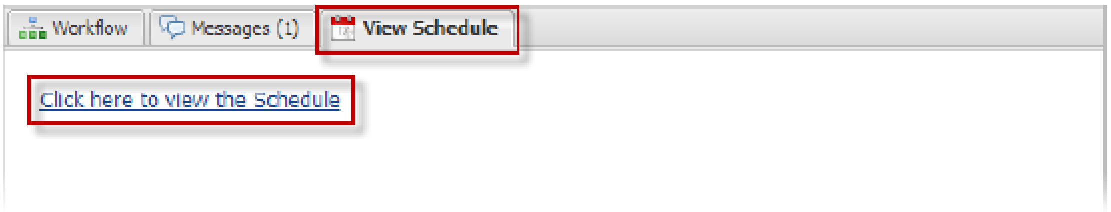


7. Click the Instructions field and enter any instructions.
8. Click **Generate**. The Work Order is generated and appears on the To-Do Work Orders list.

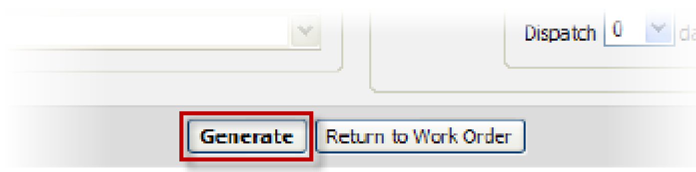


Editing a Recurring Schedule

1. To Edit a Recurring Schedule, open one of the Work Orders that is attached to the Schedule. See Finding Work Orders for more information.
2. Click the **View Schedule** tab, then on **Click here to view the Schedule**. The Schedule is displayed.



3. Make any necessary changes to the Schedule. See Creating a Recurring Schedule for more information.
4. Click **Generate**. The Schedule is updated, and the Work Orders are re-generated.



Messages

Control Panel > Building Services > Tenant Requests > Messages

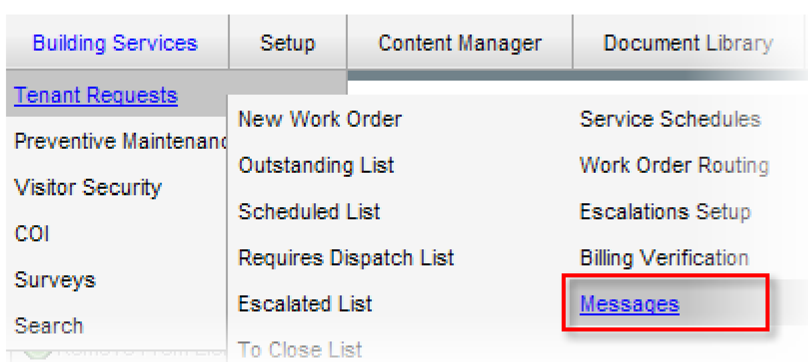
About Messages

The Messages list displays all unread messages sent to Axis Portal, using the company email address. There are two kinds of messages:

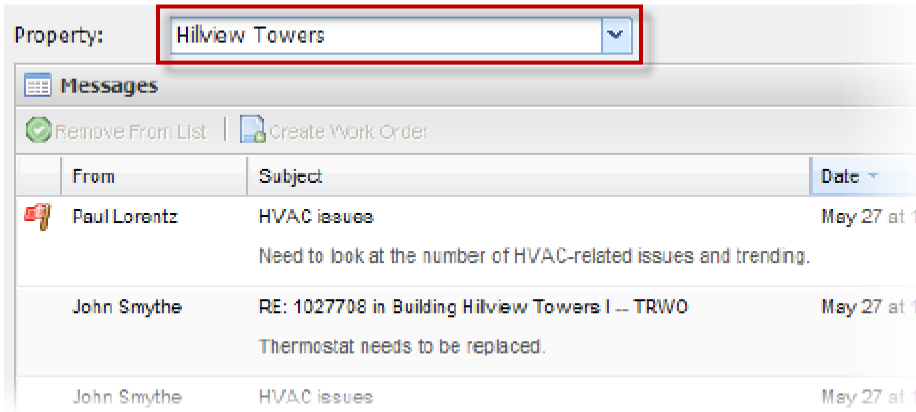
- Incoming messages related to a work order. These messages are linked to a specific work order.
- General messages received by the system. These can be messages sent by employees. Administrators can generate a work order based on the information provided in a general message.
- Reminders created by Axis Portal administrators. Reminders are always associated with a particular work order, and are marked with a  icon.

Viewing Messages

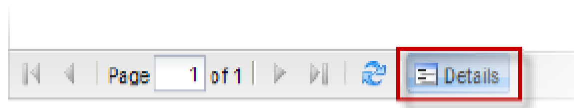
1. To open the message list, click *Control Panel > Building Services > Tenant Requests > Messages*



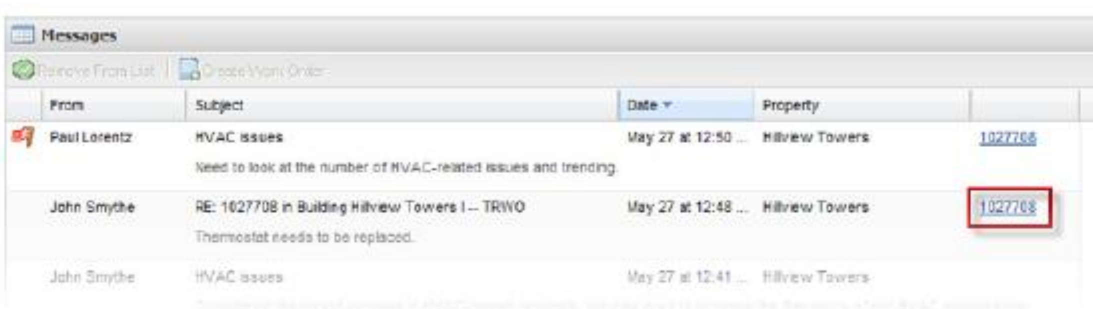
2. You can filter the messages list by using the Property drop-down list.



3. In the Messages section, all unread messages for the selected property are displayed.
4. Click the **Details** button at the bottom of the list to toggle between the normal and detailed views. The detailed view displays all message text.



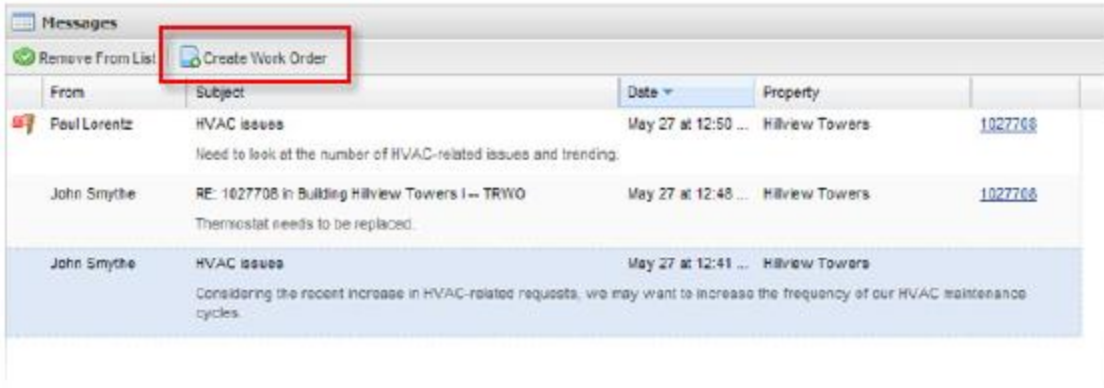
5. If the message is associated with a work order, click the work order number link to the right of the message to open the work order details.



Note:

- Only messages not currently associated with a work order can be used to create a work order.

6. To remove a message or reminder from the list, click the message, then select **Remove from list**.
7. To create a work order, using a message as its basis, select the message and then click **Create Work Order**.



Notes:

- Messages that are removed from the list are still displayed under the Messages tab of the work order they are associated with.
- Reminders that are removed from the list are still displayed as notes under the Messages tab of the work order they are associated with.

Billing Verification

Control Panel > Building Services > Tenant Requests > Billing Verification

About Billing Verification

This feature is useful for verifying the correctness of data prior to an export of billing amounts to an accounting service. Only Work Orders that have been verified will be marked as Billed in the next export.

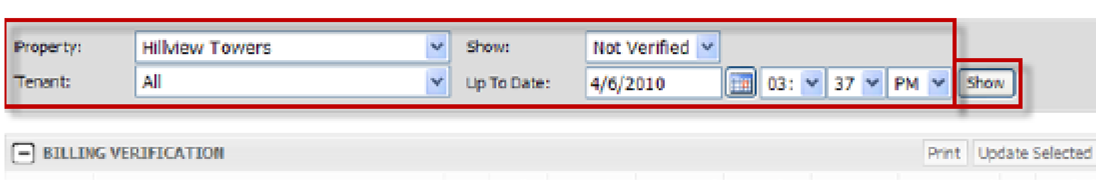
The Billing Verification screen displays Work Orders for which all billable services have been entered. The Work Orders appearing on this screen are either Verified or Not Verified. These completed Work Orders can be marked as Verified.

For users familiar with Axis Portal™, this feature offers a solution similar to the Billing Export Preview report. However, using Billing Verification, a Work Order can be checked and if necessary, modified, before marking it as Verified.

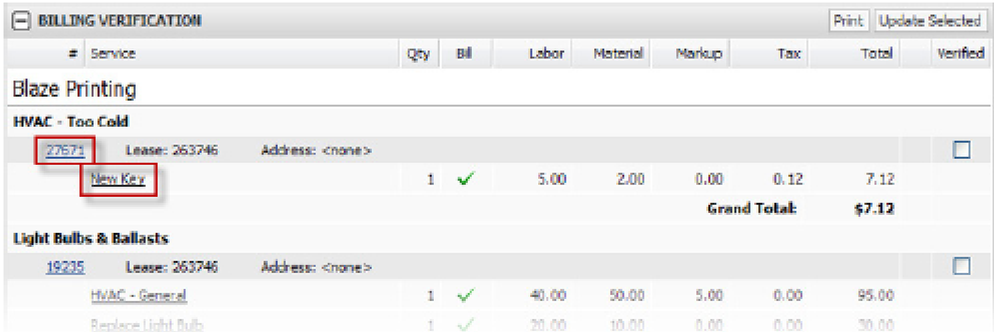
Verifying Work Orders

Work Orders that are billable to Tenants require verification. This can be done on the Billing Verification page. Although billable work orders may be complete, they will not be closed until the billing information has been verified.

1. Click *Control Panel > Building Services > Tenant Requests > Billing Verification*
2. If you are looking for work orders from a specific property, tenant, period of time, or with a specific status, use the options in the filter section at the top of the list, then click **Show.**



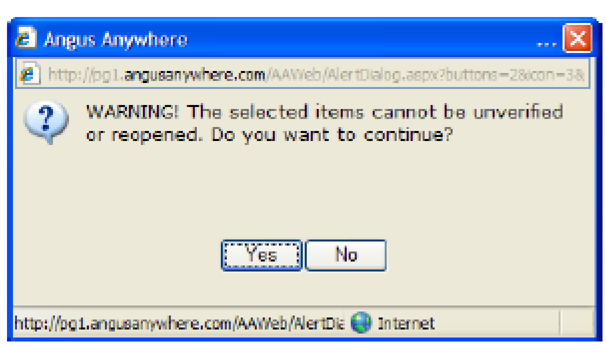
3. Locate the desired Work Order from the Billing Verification list.
4. To view the original request, place the cursor over the work order number. To view the revenue codes and cost codes for each service (if these codes are being used), place the cursor over the service.



5. Confirm that the billing amounts listed for the Work Order are correct. If there is a problem with the amount:
    - Click the Work Order ID #
    - Click **Edit** to make changes.
    - Click **Update** or **Update and Add Another**.
    - You can also include more services by clicking **Add Service**.
    - Return to the Billing Verification screen as outlined in Step 1 above.

6. Click the **Verified** checkbox next to the work order(s) you would like to verify.
7. Click **Update Selected**.

8. The system returns a warning message. Click **OK** to finish verifying the Work Order.



Note:

- If Axis Portal™ is integrated with your accounting system, a reverse button is available on the Edit Work Order screen. Click this if incorrect services have been added. This step will appear as a new history entry.