PRISM Mobile Application – User Guide

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Overview

The Prism Mobile application empowers property and facility teams to stay connected to critical building information, as well as manage and respond to tasks remotely. Easily view and execute day-to-day Work Orders, Inspections and Preventive Maintenance from your Android, iPhone, or iPad.

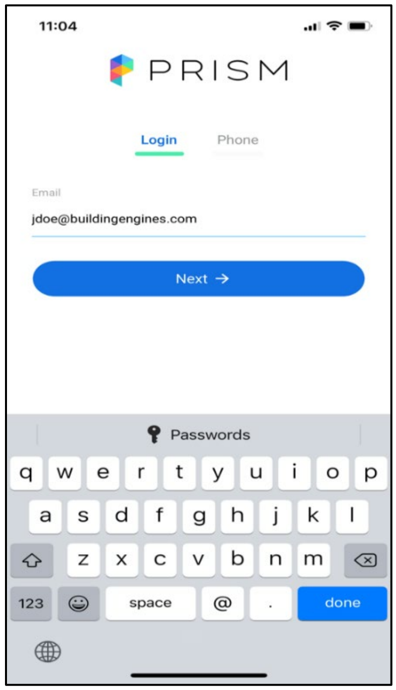
Getting Started

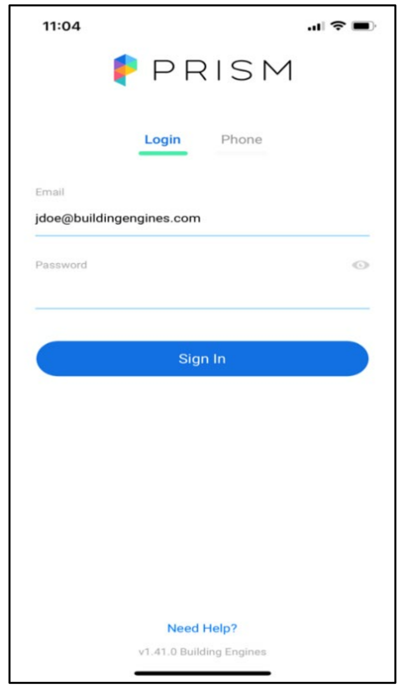
Before logging into the mobile application for the first time, seek out a location that has either a good cellular or Wi-Fi connection. Failure to do so may result in extended initial download times.

Logging In

To login into the Prism Mobile application:

1. Navigate to the Prism icon on your smartphone.
2. Enter your Email
3. Click **Next**
4. Enter Password
4. Click **Sign In**.

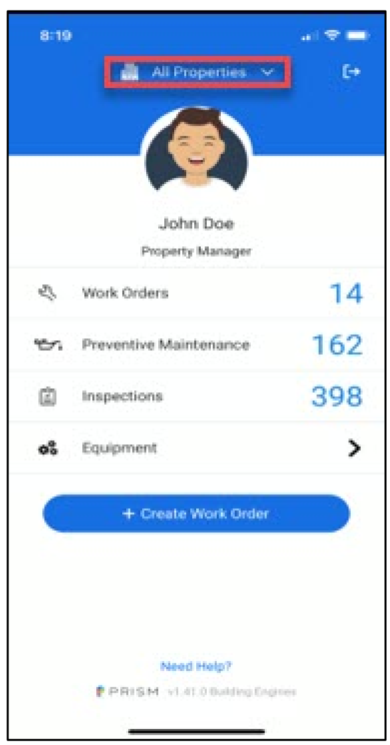




Module Navigation

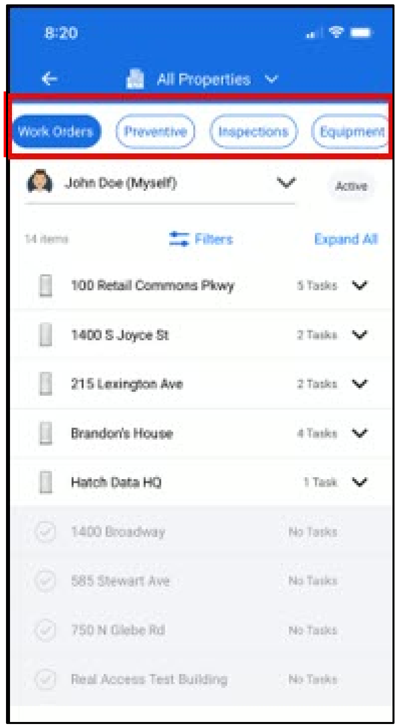
After you have logged into the application, and depending upon your system role, you are provided with a set of module specific navigational buttons. Using these buttons, you can quickly access Work Orders, Preventive Maintenance, Inspections, and Equipment.

If you are tied to multiple buildings, you will see the All Properties drop down at the top which allows you to dictate which Buildings you would like to see.



Quick Access Navigation

After selecting a module to navigate to, located along the top of the mobile application are the Quick Access navigational buttons. Using the buttons highlighted below, you can quickly access other modules (i.e., Work Orders, Preventive Maintenance, Inspections, and Equipment) and utilize the **All** button to indicate the reflected data pending on which Properties are selected.

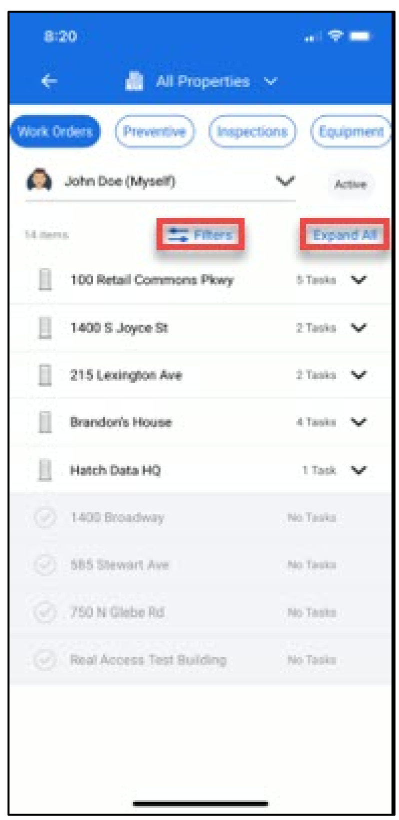


Once a module is selected, it will auto default to what you are assigned to. Depending on your role, you will have the option under the Assignee drop down to select additional users to see what Work Orders or Tasks are assigned to others.

You can also select the Active button which will populate a list of statuses to show you what is Active, New, Open, On Hold, Completed, Cancelled, Closed and Rejected. By tapping the statuses, you can choose one or multiple statuses to view – to do so, click Apply on the bottom right-hand corner.

Clicking on Filters will allow you to designate the Assignee and Status while also giving you the option to sort by Priority, Due Date, Newest and Oldest. There is also a toggle feature which gives you a choice to show Tasks grouped by Property. Once your parameters are defined, click on Save Filters.

Selecting Expand All opens the list view of Tasks to show a more detailed view.



Work Orders

This section describes the functionality of the Work Order module via the Prism mobile application.

Creating a New Work Order

1. Click **+ Create Work Order** from the home screen.
2. Take or upload a picture to illustrate the work order. Otherwise, press **Skip Photo**.
3. Press **All Issue Types** to select an issue type.
4. Enter the details of the work order and then click on Done in the bottom right-hand corner.
5. Select a **Building**.
6. (Optional) Select a **Floor**.
7. (Optional) Select an **Equipment**.
8. (Optional) Add **Assignee**.
9. (Optional) Press **Add More Details.**
    a. (Optional) Add the work order's **Specific Location.**
    b. (Optional) Choose the **Suite/Space** the work order is in.
    c. (Optional) Choose a **Tenant Company**.
    d. (Optional) Change who the work order was **Reported By.**
10. Press **Create Work Order** to finish

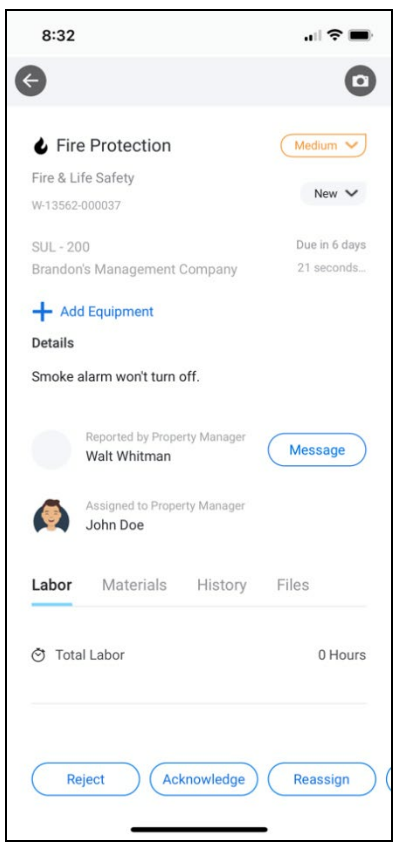
Note: although the work order is finished, by default it is unassigned. See *Reassigning a Work Order* *if you wish to assign the work order to a team member.*

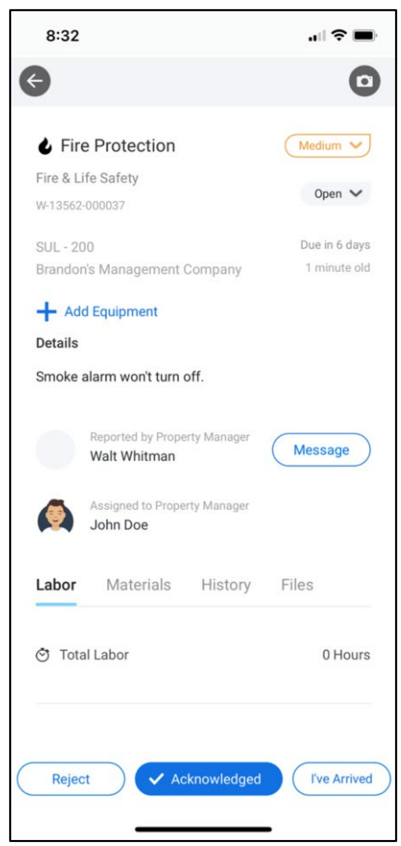
Acknowledging a New Work Order

After a work order has been created, in most cases, it is assigned to an Engineer in the field. If you are the assigned engineer, the first step in the workflow is to acknowledge the new or open work order. This section describes the process of acknowledging a work order.

To acknowledge a new or open work order:

1. Click **Work Orders**.
2. Click the new work order that has been assigned to you.
    1. Note: if the work order has not yet been assigned to you, you can select the "Assign to me" button at the bottom of the screen.
3. Click **Acknowledge** (at bottom left of the screen).
4. (Optional) If your property management company also uses the "Acknowledge - Arrival" workflow, the **Arrive** button will appear following the **Acknowledge** button.

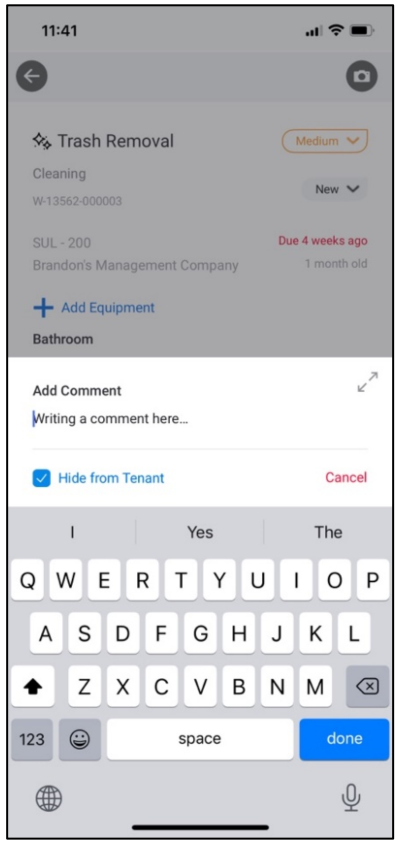




Adding a Comment to a Work Order

This section describes the process of adding a comment to a work order. To add a comment to a work order:

1. Click **Work Orders**.
2. Select a work order from the list.
3. Select the **History** tab.
4. Press **Add Comment**.
5. Enter your comment and then click Done in the bottom righthand corner.
    a. (Optional) Click **Hide from Tenant** to keep the comment internal.



Adding a Photo to a Work Order

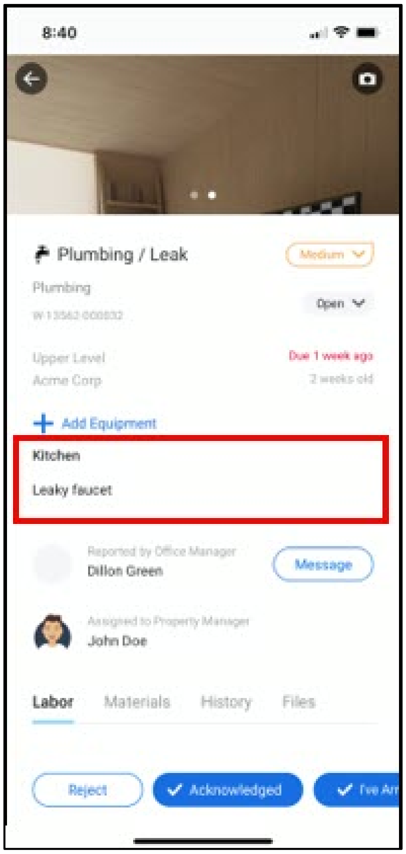
Photos can be added to new and existing work orders. This section describes the process of adding a photo to a work order. To add a photo to a work order:

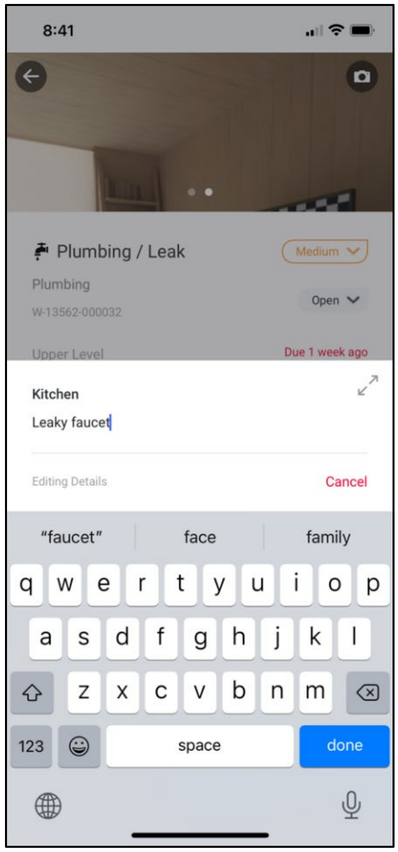
1. Click **Work Orders**.
2. Select a work order from the list.
3. Click the camera icon (top right of screen).
4. Take a photo or upload one by clicking the library icon at bottom left of the screen.
5. Click **Save.**

Editing the Details of a Work Order

This section describes the process of editing the details of a work order. To edit the details of the work order:

1. Click **Work Orders**.
2. Select a work order from the list.
3. Click the **Details** section of the work order.
4. A window will pop up where you can edit the **Details** and save.

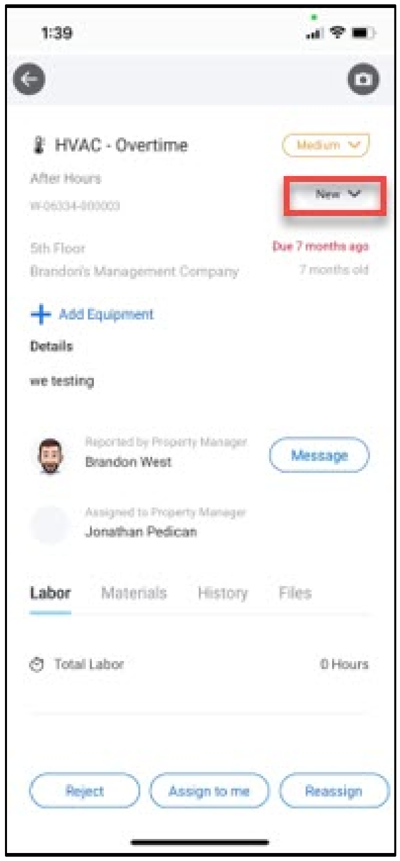


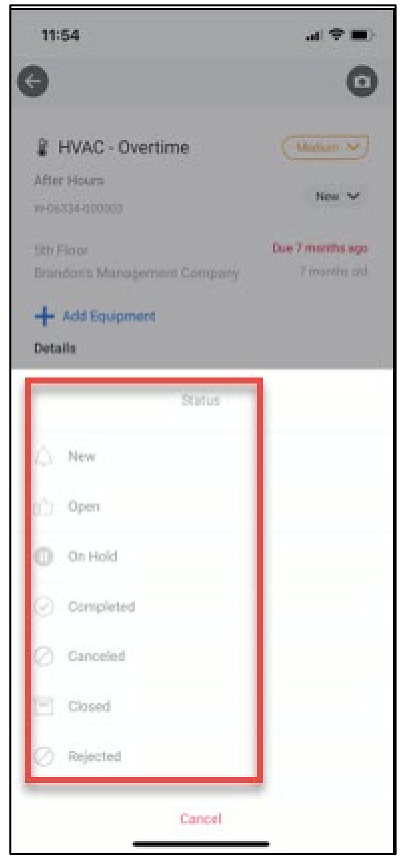


Editing the Status of a Work Order

This section describes the process of editing the status of a work order. To edit the status of a work order:

1. Click **Work Orders**.
2. Select a work order from the list.
3. Click the status button (directly across from the Work Order ID #).
4. Select the desired status.





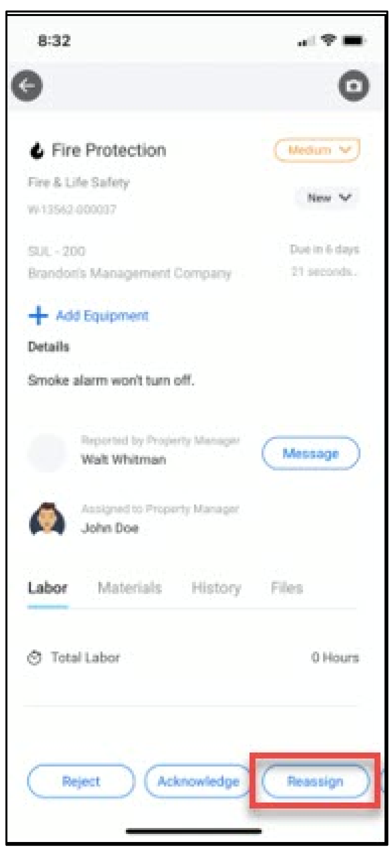
Reassigning a Work Order

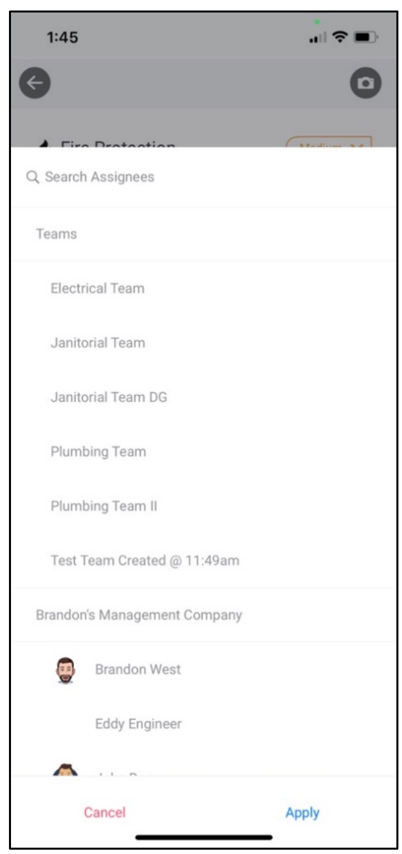
This section describes the process of reassigning a work order.

Note: If the reassignment functionality is not present in your account, and it should be, reach out to the Support team at prismsupport@buildingengines.com to gain access.

To reassign a work order:

1. Click **Work Orders**.
2. Select a work order from the list.
3. Click **Reassign** (bottom of screen)
4. Select the desired assignee, team, or organization.





Adding Labor to a Work Order

Billable and non-billable labor can be added to a work order. This section describes the process of adding labor to a work order.

To add labor to a work or

1. Click **Work Orders.**
2. Select a work order from the list.
3. Click the Add **Labor Hours** button.
4. Enter the labor hours and then select Save Hours.

Adding a Material to a Work Order

Billable and non-billable materials can be added to a work order. This section describes the process of adding materials to a work order.

1. Click **Work Orders.**
2. Select a work order from the list.
3. Select the **Materials** tab.
4. Click **Add Materials**.
5. Search and Select an existing **Material** from the **Material Library.**

*Note: to create a new **Material** for a work order, see **Creating a New Material for a Work Orde**r.*

Creating a New Material for a Work Order

If you are required to add a material to a work order that is not present in your list of available materials, you can create the new material via the mobile application. This section describes the process of creating and then adding a new material.

To create a new material for a work order:

1. 1. Click **Work Orders.**
2. Select a work order from the list.
3. Select the **Materials** tab.
4. Scroll down and click **Add Materials**.
5. Create a new **Material** by clicking the + sign (top right of screen)
    1. Enter **Material Name.**
    2. Enter **Cost** (Per Item).
    3. (Optional) Adjust the **Quantity** of the **Material** and add **Notes**.
    4. (Optional) Save the **Material** to the **Material Library** for future use.
        1. Choose the **Category** of the new **Material.**
        2. (Optional) Press **Add More Details** to add Manufacturer, Inventory Number, Part Number, or SKU.
        3. Press **Add Material**.

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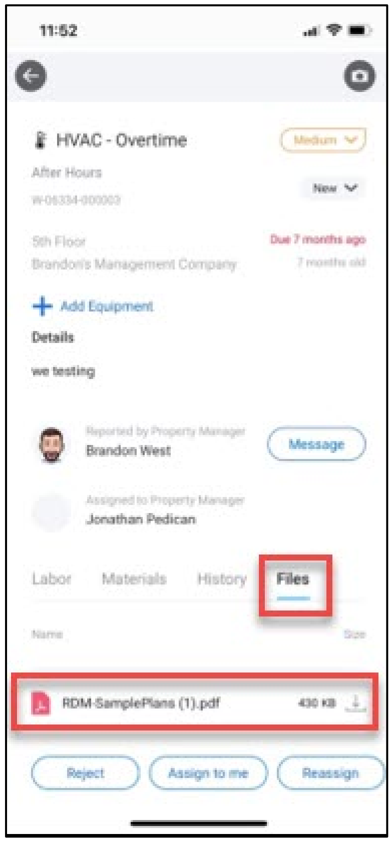
Viewing a File on a Work Order

This section describes the process of viewing files or photos linked to a work order. To view a file linked to a work order:

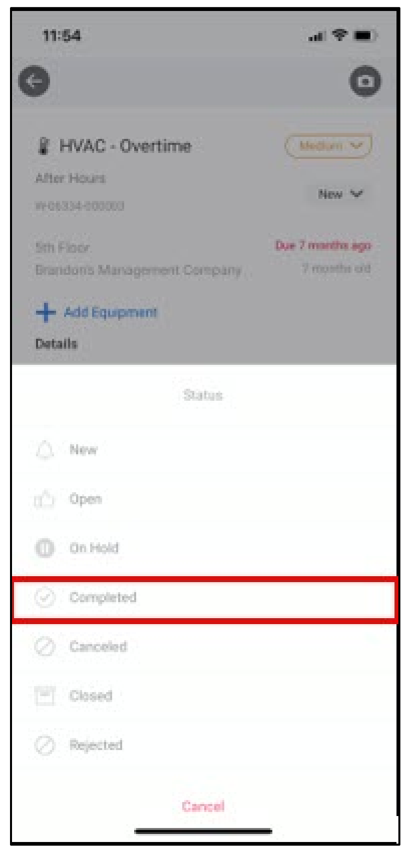
1. Click **Work Orders.**
2. Select a work order from the list.
    1. Photos attached to the work order will automatically display in the gallery at the top of the screen. You can tap to expand a photo, or swipe to scroll through multiple photos.
3. To view other files, select the **Files** tab.
4. (Optional) Press the download button and select the desired **File** to view it.



Completing a Work Order

This section describes the process of completing a work order. To complete a work order:

1. Click **Work Orders.**
2. Select a work order from the list.
3. Click the status dropdown menu (toward the top right of the screen)
4. Select Completed as the work order's new status.

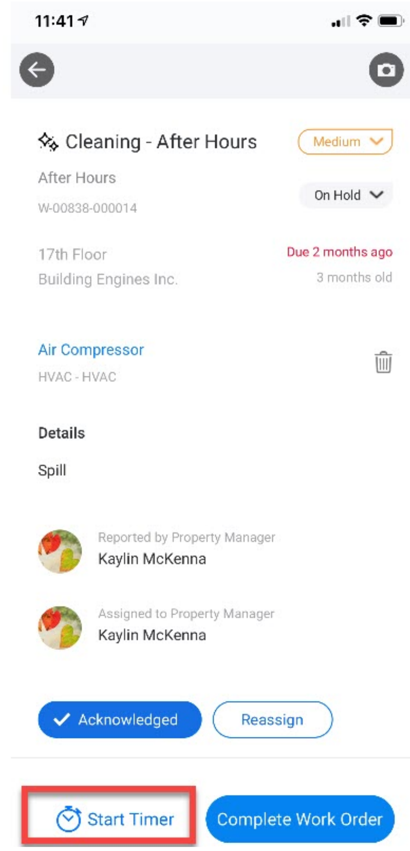


Viewing the History of a Work Order

This section describes the process of viewing the history of a work order. To view the history of a work order:

1. Click **Work Orders.**
2. Select a work order from the list.
3. Select the **History** tab.
4. Scroll down to view the work order's **History**.

Using Time Tracking on a Work Order



Time Tracking is an optional feature within the mobile application which is used to keep track of the time spent on Work Orders, Preventative Maintenance, and Inspections. Time can only be running for one task at a time, and can be paused, or overridden, as necessary. This section describes how to use the time tracking feature.

To start the time tracking feature on a Work Order:

1. Click **Work Orders**.
2. Select a work order from the list.
3. Click on **Start Timer** – this will display a sticky banner at the top of the work order to show the running time.
4. (Optional) To pause the timer, click **Pause** on the sticky banner. To continue, click **Resume** when you are ready to pick up where you left off.
5. (Optional) Clicking on the three (3) dots on the right-hand side will allow you to either save the labor or cancel the timer at any time. You can also select **Cancel** at the bottom on the work order.
6. After you complete the work order, click **Pause** and then select the three (3) dots on the right-hand side and select **Save Labor**. You can also select **Complete Work Order** at the bottom and receive a pop-up to notify you of your Active Timer which also allows you to save your labor against the work order.
7. (Optional) You can manually override the timer by typing in the **Recorded Time**.
8. (Optional) Click into the **Performed By** drop down if the work was completed by another user.
9. (Optional) Add **Notes.**
10. Select Save Hours. This can then be found under the Labor tab on the Work Order.

Floor Plan Preview

This section describes how to preview Floor Plans and pins on Work Orders.

1. Click **Work Orders** from the home screen.
2. Select a work order from the list.
3. Under **Details** select Floor plan.
    a. Tap on Floor plan and pinch to drill in on the pin.

Preventive Maintenance

This section describes the functionality of the Preventive Maintenance module via the mobile application.

Starting a PM Task

This section describes the process of starting a PM task from the mobile device. To start a PM task:

1. Click **Preventive Maintenance** from the home screen.
2. Select the PM task you want to begin.

Adding a Comment to a PM Task

This section describes the process of adding a comment to a PM Task. To add a comment to a task:

1. Click **Preventive Maintenance.**
2. Select a PM task.
3. Select the **History** tab.
4. Press **Add Comment** to enter your comment.
5. (Optional) Check **Hide from Tenant** to keep the comment internal.

Adding a Photo to a PM Task

This section describes the process of adding a photo to a PM Task. To add a photo to a PM task:

1. Click **Preventive Maintenance.**
2. Select a PM task.
3. Click the camera icon (top right of screen).
4. Take a picture *or* upload from your photo library using the library icon at bottom left of the screen.
5. Click **Save**.

Adding a Material to a PM Task

This section describes the process of adding materials to your PM tasks. To add a material to a PM task:

1. Click **Preventive Maintenance.**
2. Select a PM task.
3. Select the **Materials** tab.
4. Scroll down and press **Add Material**.
5. Search and Select an existing **Material** from the **Material Library.**

*Note: to create a new **Material** for a work order, see **Creating a New Material for a PM Task**.*

Creating a New Material for a PM Task

If you are required to add a material to a PM Task that is not present in your list of available materials, you can create the new material via the mobile application. This section describes the process of creating and then adding the new material via the mobile application.

To create a new material for a PM Task:

1. Click **Preventive Maintenance.**
2. Select a PM task.
3. Select the **Materials** tab.

4. Scroll down and press **Add Material**.
5. Create a new **Material** by clicking the + sign (top right of screen)
    1. Enter **Material Name.**
    2. Enter **Cost** (Per Item).
    3. (Optional) Adjust the **Quantity** of the **Material** and add **Notes**.
    4. (Optional) Save the **Material** to the **Material Library** for future use.
        1. Choose the **Category** of the new **Material.**
        2. (Optional) Press **Add More Details** to add Manufacturer, Inventory Number, Part Number, or SKU.
        3. Press **Add Material**.

Adding Labor to a PM Task

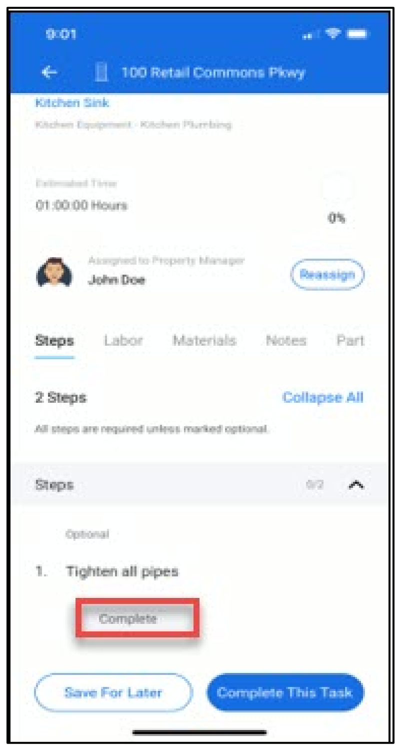
This section describes the process of adding labor hours to your PM tasks. To add labor to a PM task:

1. Click **Preventive Maintenance.**
2. Select a PM task.
3. Select the **Labor** tab.
4. Press **Add Labor Hours**.
5. Enter your hours and press **Save Hours.**

Completing PM Task Steps

This section describes how to complete the PM task steps. To complete the PM task steps:

1. Click **Preventive Maintenance.**
2. Select a PM task.
3. Scroll down to see the PM task's **Steps**.
4. Click **Complete** to mark each **Step** complete.
5. Once all PM task **Steps** are marked complete, you can mark the entire PM task complete by selecting the **Complete Task** button (bottom right of screen).
6. Additionally, if all steps are not yet ready to be marked as complete the Task will save with those completed steps and allow you to come back later to check off additional steps or utilize the **Mark Remaining Steps Complete** button.
7. **Please note**: selecting the Mark Remaining Steps Complete button does not mark the Task as Complete.



Viewing a File on a PM Task

This section describes the process of viewing files or photos linked to a PM task. To view a file linked to a PM task:

1. Click **Preventive Maintenance.**
2. Select a PM task.
    1. Photos attached to the work order will automatically display in the gallery at the top of the screen. You can tap to expand a photo, or swipe to scroll through multiple photos.
3. To view other files, select the **Files** tab.
4. (Optional) Press the download button and select the desired **File** to view it.

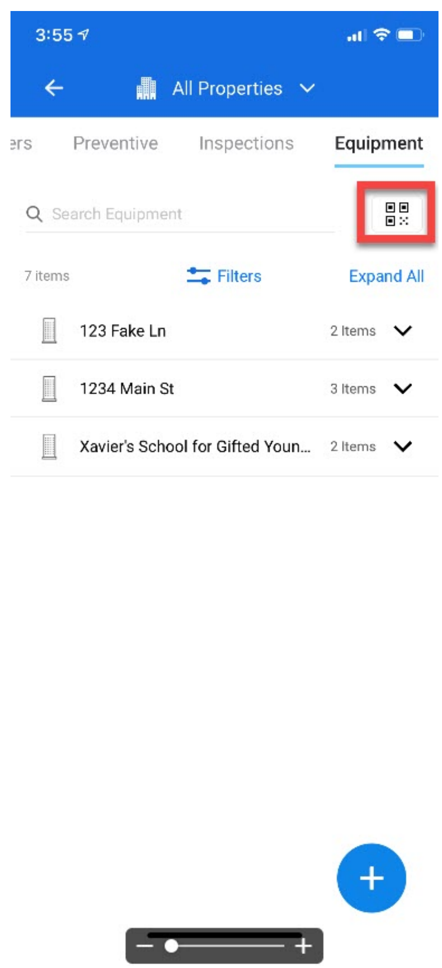
Viewing the History of a PM Task

This section describes the process of viewing the history of a PM Task. To view the history of a task:

1. Click **Preventive Maintenance.**
2. Select a PM task.
3. Select the **History** tab.
4. Scroll down to view the PM task's **History**.

Creating New Equipment

1. Click **Equipment** from Home Screen and click on the blue plus sign icon to create Equipment.
2. Enter **Equipment** Name.
3. Select **Property**.
4. Select **Category**.
5. Choose **Asset Type**.
6. (Option) Toggle to list whether this Equipment is critical.
7. (Optional) Select a **Floor**.
8. (Optional) Select a **Space**.
9. (Optional) Add the Equipment's **Specific Location**.
10. (Optional) **Add Photo**(s).
11. Selecting **Add More Details** gives the following options:
    1. (Optional) Add **Manufacturer**.
    2. (Optional) Add **Model Number**.
    3. (Optional) Add **Serial Number**.
    4. (Optional) Add **Asset Tag**.
    5. (Optional) Add **Equipment Notes**.
    6. (Optional) Add **Safety Notes**.
12. Press **Create Equipment** to finish.



Searching for an Equipment Record

The Mobile Application allows you to search for a piece of equipment using a series of imbedded search filters. This section describes the process of searching for a piece of equipment.

To search for a piece of equipment:

1. Click **Equipment** from the home screen.
2. Search for **Equipment** using the search bar *or*
3. Click the **Filters** menu to search for (active or inactive) **Equipment by Category and Asset Type – sort by Last Modified, Last Serviced, or Install Date.**

Utilizing QR Codes

The section describes the QR code feature and how it is configured within the Mobile Application.

To search for a piece of equipment using a QR code:

1. Click **Equipment** from the home screen.
2. Click on the QR code icon to pull up the camera.
3. If the QR code is a match to an existing QR code in the application, then the equipment record will be displayed.
4. QR codes can be searched, added/removed from existing equipment, and can be added or removed while creating new equipment.

Inspections

This section describes the functionality of the Inspections module via the mobile application.

Starting an Inspection

This section describes how to start an inspection from your mobile device. To start an inspection:

1. Click **Inspections** from the home screen.
2. The Inspection tasks will be grouped together by Properties.
3. Select Property to expand Inspections.
4. Click into Inspection to start work.

Adding Labor to an Inspection

Billable and non-billable labor can be added to an inspection. This section describes the process of adding labor to an inspection.

To add labor to an inspection:

1. Click **Inspections**.
2. Open an inspection task.
3. Select the **Labor** tab.
4. Click **Add Labor Hours**.
5. Enter your hours and press **Save**.

Adding a Material to an Inspection

Materials can be added to an inspection to track resources used or to bill back tenants for services you have provided. This section describes the process of adding material to an inspection.

1. Click **Inspections**.
2. Open an inspection task.
3. Select the **Materials** tab.
4. Press **Add Material.**
5. Select **Material**(s) from the **Material Library**.
6. Press **Choose Material**.
7. *Note: to create a new* ***Material*** *for an inspection, see* ***Creating a New Material for an Inspection****.*

Creating a New Material for an Inspection

If you are required to add a material to an Inspection that is not present in your list of available materials, you can create the new material via the mobile application. This section describes the process of creating and then adding the new material via the mobile application.

1. Click **Inspections.**

2. Select an Inspection task.
3. Select the **Materials** tab.
4. Scroll down and press **Add Material**.
5. Create a new **Material** by clicking the + sign (top right of screen)
    1. Enter **Material Name.**
    2. Enter **Cost** (Per Item).
    3. (Optional) Adjust the **Quantity** of the **Material** and adding **Notes**.
    4. (Optional) Save the **Material** to the **Material Library** for future use.
        1. Choose the **Category** of the new **Material.**
        2. (Optional) Press **Add More Details** to add Manufacturer, Inventory Number, Part Number, or SKU.
        3. Press **Add Material**.

Completing Inspection Questions

This section describes how to complete the inspection questions.

To complete the inspection questions:

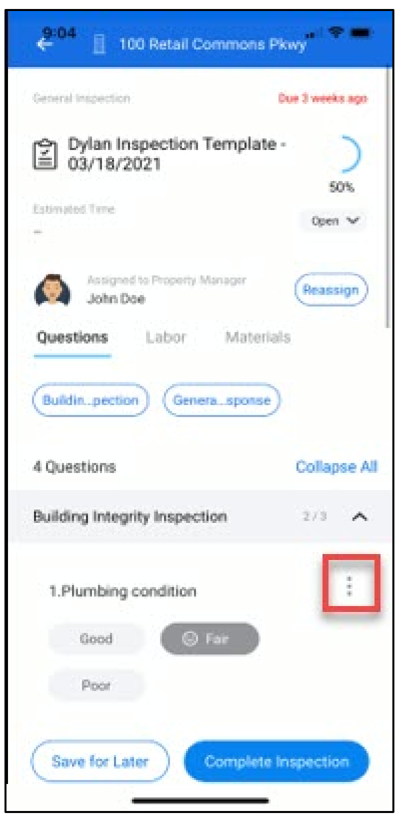
1. Click **Inspections.**
2. Select an inspection task.
3. Scroll down to answer each question.
4. Once all questions have been completed, press **Complete Inspection** to mark the inspection status as complete.
5. If you are unable to complete the inspection, you also have the option to select S**ave for Later**.

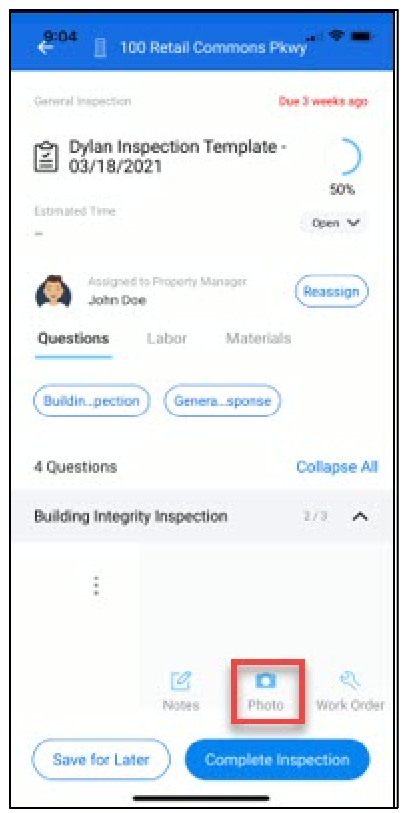
Adding a Photo to an Inspection

It is common for photos to be included in an inspection. Depending upon how the inspection was created, you may be required to use a photo to answer a question or add a photo as a supplement to your text-based answer. This section describes the process of adding photos to your inspection.

To add a photo to a specific question in an inspection:

1. Click **Inspections.**
2. Select an inspection task.
3. Click the 3 vertical dots on the right side of any of the inspection questions.
4. Select **Photo**.
5. Take a photo or upload a photo from your library by pressing the library icon at bottom left of the screen.
6. Press **Save**.



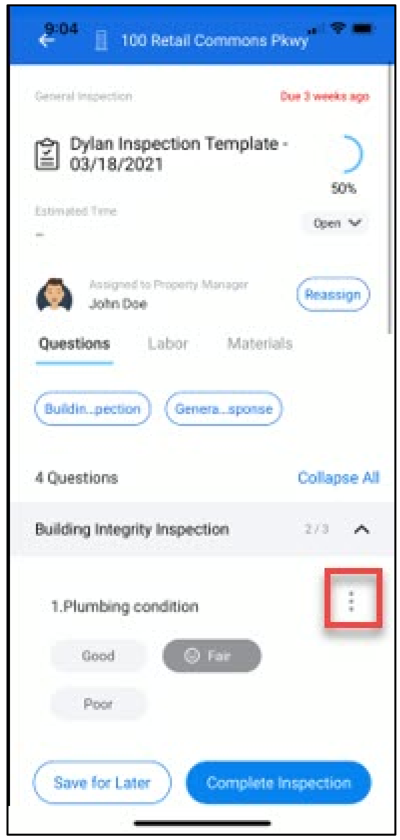


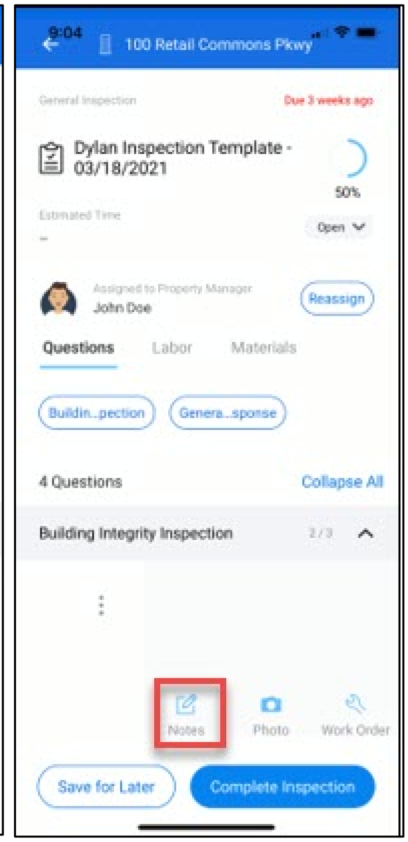
Adding a Notes to an Inspection

This section describes the process of adding text notes to your inspection.

To add a photo to a specific question in an inspection:

1. Click **Inspections.**
2. Select an inspection task.
3. Click the 3 vertical dots on the right side of any of the inspection questions.
4. Select **Notes**.
5. Type your note's details and press enter.
6. Press **Save**.





Creating a Work Order from an Inspection

This section describes the process of creating a work order from your inspection.

To create a work order from a specific question in an inspection:

1. Click **Inspections.**
2. Select an inspection task.
3. Click the 3 vertical dots.
4. Select **Work Order**.
5. Complete the required fields for the work order. See **Creating a New Work Order** for help.