

**CUSHMAN &
WAKEFIELD**

SWAP User Guide – Vendor Administrator + Technician

ANZ-GTS-SI-2005

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1.0 Definitions

Term	Definition
Corrective Work Required	If a technician is on a preventative maintenance (PM) run and Identifies an issue that needs to be fixed while on site or moving forward then you will need to obtain the detail or the works that need to be conducted and enter it within this field.
CXC	Customer Experience Centre
ESI	Essential Site Information
Future Works Required	If a technician attends site and makes safe, conducts work however there are future works to be conducted or a quote needs to be conducted then this is where you need to enter the future works information.
Hazard Identified	If a hazard has been identified while on site then a description of the hazard needs to be documented within the Hazard Identified field.
PRA	Pre-Start Risk Assessment
PTW	Permit to Work
Registered Technician	Approved as a competent and qualified technician within the SWAP app
Responsible Person	Person with supervisory or management responsibility for the technician such as an Area Supervisor or the Vendor Administrator
SWAP	Safe Work Assurance Platform
SWAP Vendor Administrator Portal	The vendor administrator and technician has access to the portal
Technician	The contractor company's registered technician, worker or subcontractor
Vendor Administrator	The contractor company administrator for SWAP i.e. the SWAP system and issuing work orders

2.0 Access

To access the SWAP Vendor Administration/Technician Portal, go to <http://www.cushwakeswap.com> and use your login details.

As a SWAP Vendor Administrator, you can:

- Receive Cushman & Wakefield work orders
- Invite technicians to register to SWAP
- Upload technician and worker qualifications on behalf of the technician/worker
- Manage and assign work orders to technicians, workers and subcontractors

As a SWAP Technician, you can:

- Register with SWAP
- Upload your current qualifications
- Update your profile

2.1. Browser Requirements

There are minimum Browser requirements. You will need:

- Microsoft Internet Explorer (10 or above),
- Microsoft Edge (3 or above),
- Mozilla Firefox (48 or above),
- Google Chrome (Windows and Mac).

2.2. Help

If you are having issues using the SWAP Vendor Administration Portal, go to the SWAP Engagement Portal at www.cushwakeswap.com.au and check the FAQ section to see if your query can be resolved.

If your query cannot be found, please contact

- In Australia email au.swap@cushwake.com. For urgent questions only please call 1300 149 286.
- In New Zealand email nz.swap@cushwake.com. For urgent questions only please call 0800 888 068.

In the body of the email, write down the issue and include screen shots where possible, and include your best contact details.

3.0 Background

All contractors (technicians, workers, and subcontractors) performing work for Cushman & Wakefield to our various clients use the SWAP system for work order management.

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

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

Only when the technician closes a work order in the SWAP app can the Vendor Administrator invoice Cushman & Wakefield.

4.0 SWAP Engagement Portal

The SWAP Engagement Portal at www.cushwakeswap.com.au is your one stop shop for information regarding SWAP. Please bookmark this site and check often for updates. We will inform you when there are major updates to SWAP, and will have the updated information ready in this portal for your reference. Use the Menu tab on the top right hand corner to easily navigate around the portal.

Please use the Engagement Portal for:

- View latest news
- Downloading current User Guides
- Viewing current FAQ
- Contacting us with any issues, questions, or other non-urgent queries



The Cushman & Wakefield Safe Work Assurance Platform (SWAP) is a mobile application that integrates safe systems of work as part of a work order management solution. SWAP replaces current paper forms with one handy app that allows contractors to:

- Receive and close work orders
- Complete pre-start risk assessments
- Request and receive approval for permits to work
- Collect asset information
- Manage qualification, licence and certification expiration dates
- Assurance only competent and qualified technicians complete jobs
- Complete service delivery commentary against the asset including any future maintenance recommendations

SWAP manages contractors, technicians and workers on an individual level. The application requires each technician and worker to register and then record all qualifications relating to their job and skill set, which will allow them to be allocated work orders directly relevant to their skill level. SWAP registration is also required for subcontractor companies and their technicians or workers.

SWAP shows all current valid qualifications for each technician and worker at the time of allocating the job. Expired qualifications will need to be updated in the system to enable the technician or worker to be allocated further work. In this way, SWAP provides employers with an easy way to keep track of their technicians' and workers' qualifications.

How does SWAP work?

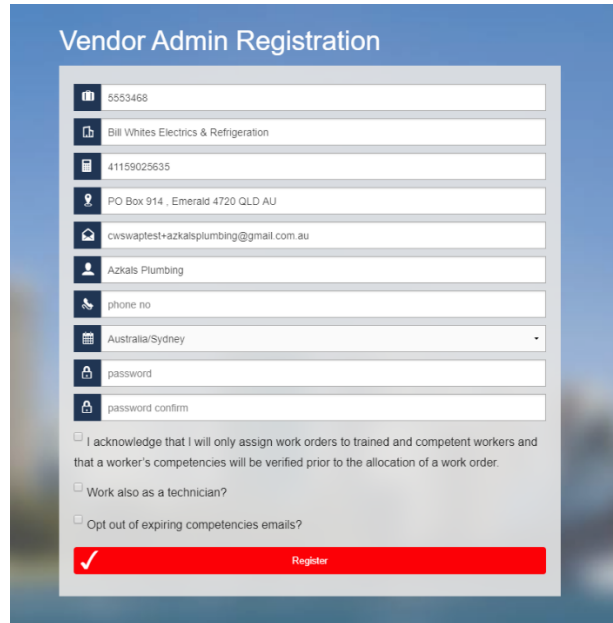
When a work order is raised by the Cushman & Wakefield Operations Centre (call centre), it is sent directly to the contractor company's SWAP Contractor Portal, who will then allocate the job to a qualified technician or worker. The job is accepted through the SWAP app by the technician or worker, who completes the job using the app.

5.0 Registration Process

5.1. Vendor Administrator invited to SWAP

Cushman & Wakefield will invite the Contractor Company Contact (Vendor Administrator) via email to register in SWAP. You will need to use a computer or laptop to register. Once registered you can invite additional Vendor Administrators for your company, if required. This may include administrators in your various branches (see [Invite More Vendor Administrators](#)).

You will receive an email invitation, which contains attachments with further information. Click on the link in the email, which will take you to the SWAP Vendor Administrator Portal to complete your registration. At the registration screen, input contact phone details and create a password for your login.



Vendor Admin Registration

5553468

Bill Whites Electrics & Refrigeration

41159025635

PO Box 914, Emerald 4720 QLD AU

cswaptest+azkalsplumbing@gmail.com.au

Azkals Plumbing

phone no

Australia/Sydney

password

password confirm

I acknowledge that I will only assign work orders to trained and competent workers and that a worker's competencies will be verified prior to the allocation of a work order.

Work also as a technician?

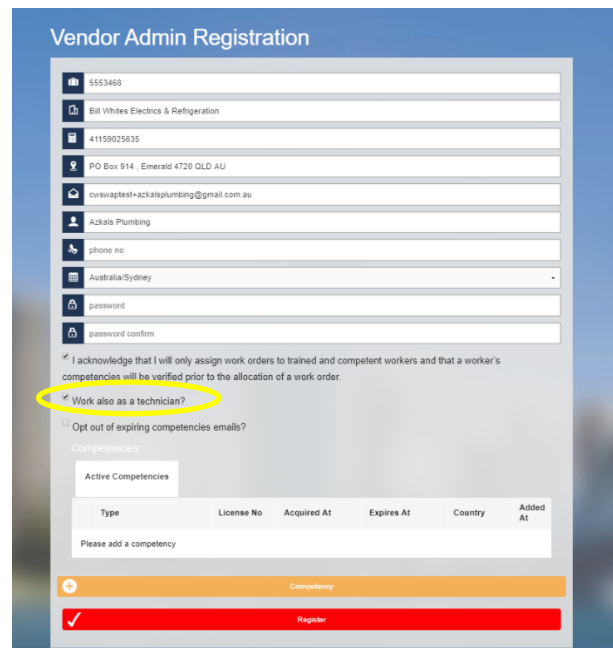
Opt out of expiring competencies emails?

Register

At this stage, you must acknowledge that as a Vendor Administrator you will only assign work orders to trained and competent workers, and that a worker's competencies will be verified prior to the allocation of a work order.

5.2. Registering as a VA + Technician

If you also work for the vendor as a technician, when you register for SWAP, select 'work as a technician also'. This will allow you to use SWAP as a technician. You will then be asked to enter your competencies. See [Adding My Competencies](#).



Vendor Admin Registration

5553468

Bill Whites Electrics & Refrigeration

41159025635

PO Box 914, Emerald 4720 QLD AU

cswaptest+azkalsplumbing@gmail.com.au

Azkals Plumbing

phone no

Australia/Sydney

password

password confirm

I acknowledge that I will only assign work orders to trained and competent workers and that a worker's competencies will be verified prior to the allocation of a work order.

Work also as a technician?

Opt out of expiring competencies emails?

Competencies

Type	License No	Acquired At	Expires At	Country	Added At
Please add a competency					

Competency

Register

5.3. Adding My Competencies

If you have selected that you are also working in SWAP as a technician, you will be asked to add in your competencies before you complete your registration. To do this, click on the Competency button at the bottom of the registration screen



The screenshot shows the 'Vendor Admin Registration' form. At the bottom, there is a yellow circle around a button labeled 'Competency'. Below it is a red 'Register' button.

Fill in the Add Competency form. You will need to enter your name, competency information for the work you perform, and **issue date** or **expiry date** listed. If your competency does not have either an acquired date or an expiry date please select the relevant Not Applicable field.

Competencies include:

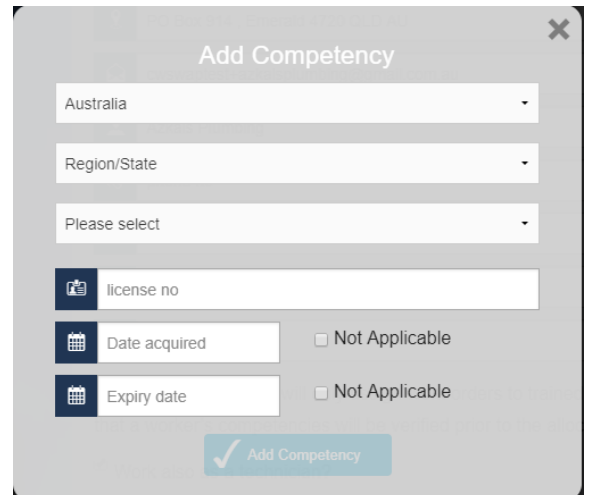
- licences
- qualifications
- induction records
- certificates, e.g. white card (construction), first aid etc.
- checks, e.g. police check, working with children etc.
- any other records required by the client or by your trade

Click Add Competency to submit the competency. If you have multiple competencies, click on the Competency button again to fill in details for the new competency.

Do not click 'Register' until your competencies have been added, otherwise you may be ineligible to receive work.

Once your competencies have been added, you will see your full list of competencies under 'Competencies'. Then click Register to complete your registration. Once you have done this, you are now registered to receive work orders via SWAP.

Note: Please ensure all relevant licences, certificates and qualifications are current and have been provided to your employer/contracting company.



The screenshot shows the 'Add Competency' form. It includes dropdown menus for 'Australia', 'Region/State', and 'Please select'. There are input fields for 'license no', 'Date acquired', and 'Expiry date', each with a 'Not Applicable' checkbox. A blue 'Add Competency' button is at the bottom.

Vendor Admin Registration

5553468

Bill Whites Electrics & Refrigeration

41159025635

PO Box 914, Emerald 4720 QLD AU

twswapfest+azkalsplumbing@gmail.com.au

Azkals Plumbing

phone no

Australia/Sydney

I acknowledge that I will only assign work orders to trained and competent workers and that a worker's competencies will be verified prior to the allocation of a work order.

Work also as a technician?

Opt out of expiring competencies emails?

Competencies:

Active Competencies

Type	License No	Acquired At	Expires At	Country	Added At
BP Induction	85413212	10/12/2018	30/11/2020	VIC, Australia	10/12/2018

Competency

Register

5.4. Competencies

You will need to ensure that all competencies are valid and up to date at all times to be eligible to receive work orders.

Note: If one or more of your licences are expired, you will be disqualified from receiving works.

Your competencies will be broken up into 3 tables:

- Active Competencies:**
 This tab will list all your current active licences. Whenever you add a new competency or renew an old competency, they will be listed here. You can [retire](#) or [renew](#) competencies from this tab.


Competencies:

Active Competencies							Retired Competencies			Historical Competencies		
Type	License No	Acquired At	Expires At	Country	Added At							
Cushman & Wakefield Induction	5754389	19/01/2021	17/07/2025	VIC, Australia	18/01/2021							

Competency Update

- Retired Competencies:**
 This tab will list all competencies that you have marked as retired. These can be [renewed](#) at any time if required.

Competencies:

Active Competencies		Retired Competencies	Historical Competencies				
Type	License No	Acquired At	Expires At	Country	Added At	Retired At	
 [Other Plumbing Licence] Plumber	39944855	01/02/2017	N/A	VIC, Australia	20/06/2017	17/03/2021	

+ Competency
Update

- **Historical Competencies:**


This tab will list all previous version of competencies which have been renewed.

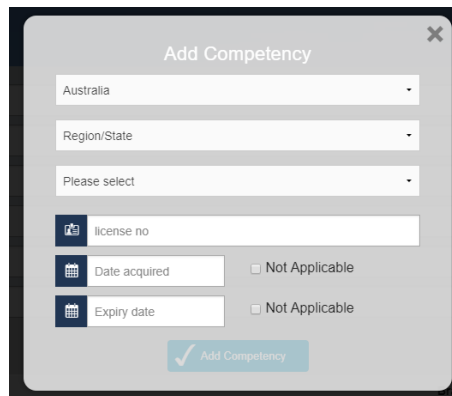
Competencies:

Active Competencies		Retired Competencies	Historical Competencies				
Type	License No	Acquired At	Expires At	Country	Added At	Replaced At	
[Other Plumbing Licence] Plumber	39944855	01/02/2017	N/A	VIC, Australia	20/06/2017	17/03/2021	


+ Competency
Update

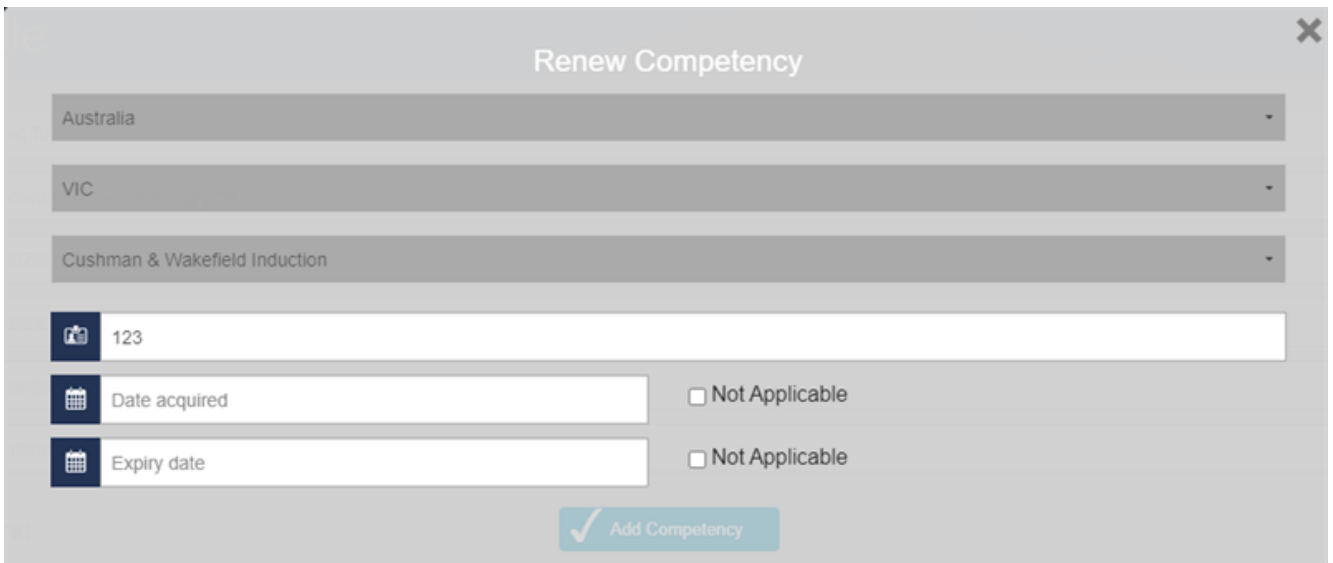
5.4.1. Adding New Competencies

To add a new competency, you will need to select the yellow  button and fill out all of the fields. Note that if your competency does not have an Acquired Date or Expiry Date you will need to select Not Applicable for this date.




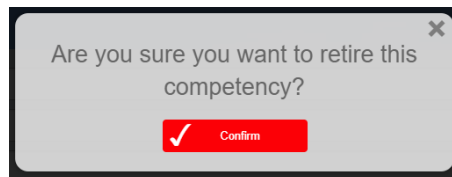
5.4.2. Renewing an Expired or Retired Competency

If you have a competency that has expired or that you have a new competency for you will need to renew this. To renew a competency, you will need to select the  beside the expired or retired competency and add in your new expiration dates.



5.4.3. Retiring a Competency

If you have competency on your list that you are not intending to renew or no longer required you should retire this. To Retire a competency, you will need to select  beside the competency needing to be retired and select confirm on the pop-up screen. This competency will then be moved to the 'Retired Competencies' Tab, where it can be renewed if required.



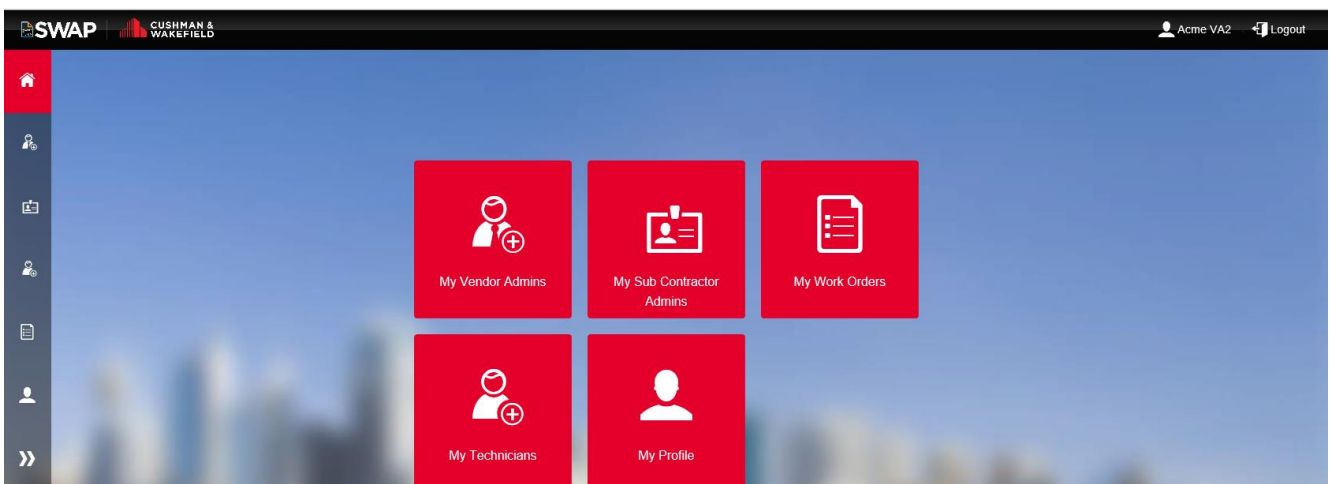
Mandatory Competencies: Some clients are set up to have Mandatory Competencies. This means that you will be ineligible to receive work orders for a client if you do not have all of their Mandatory Competencies. These competencies are always being updated. To find out what competencies are mandatory for a client that you service, please speak with your Facilities Managers.

Note: Vendor Admins will need to approve any competency changes before technicians can be assigned work orders. Refer to section [Reviewing Competencies](#) for instructions on how to do this.

6.0 SWAP Vendor Administrator Portal Overview

6.1. Portal Navigation

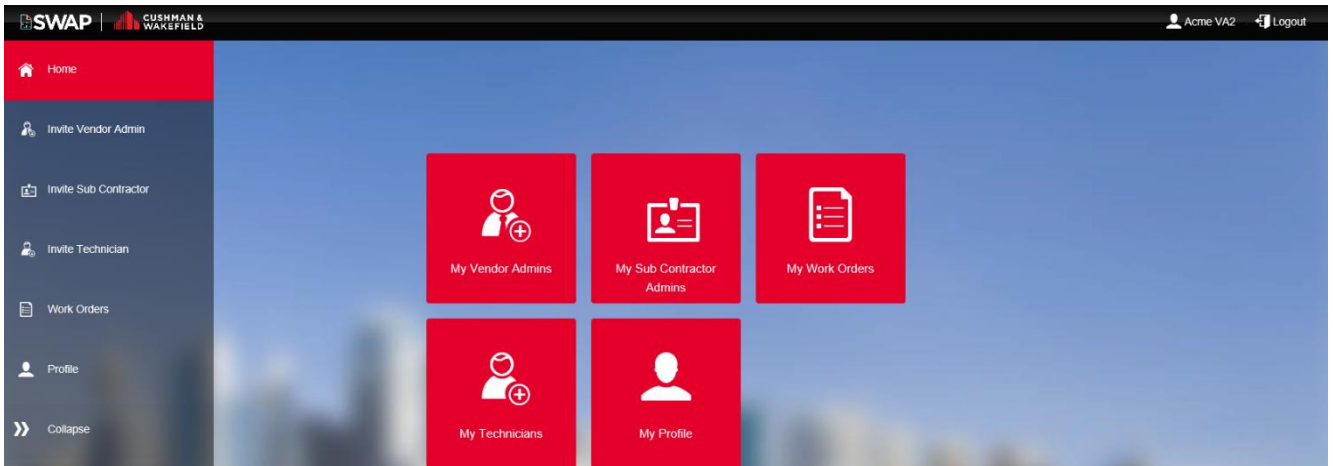
Once you have logged into the SWAP Contractor Portal, you will be presented with the main screen.



You will see the following tiles:

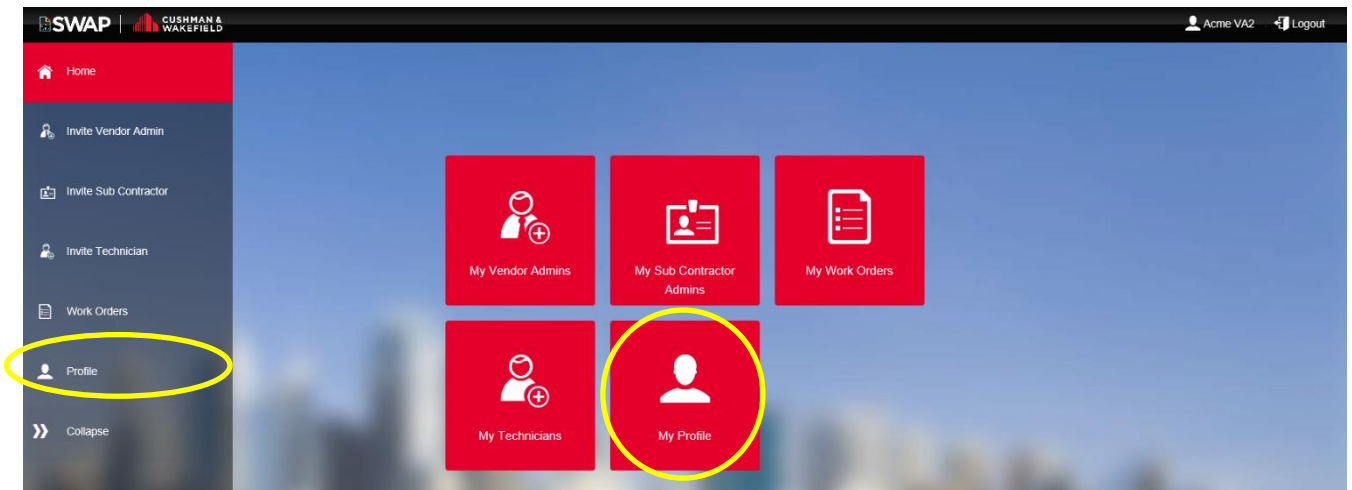
- **My Vendor Admins:** Where you can invite additional administrators
- **My Sub Contractor Admins:** Where you can invite subcontractor vendor administrators
- **My Technicians:** Where you can invite technicians, workers and subcontractors
- **My Work Orders:** where you can view, accept and assign work orders to technicians
- **My Profile:** Where you can update your personal profile in SWAP

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



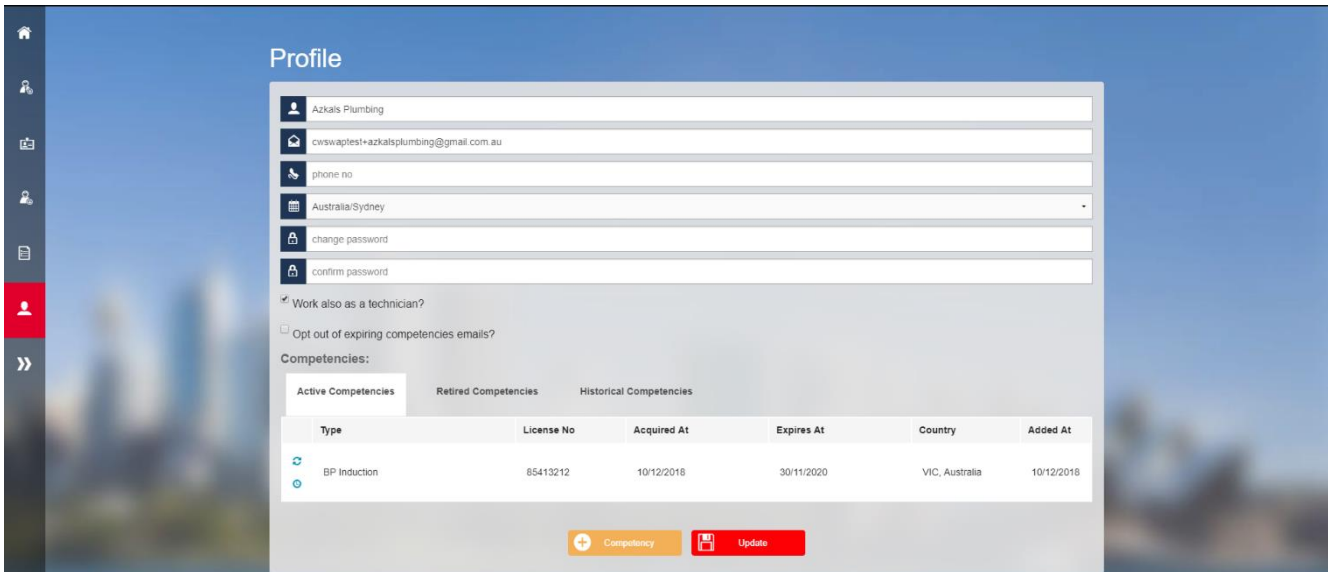
6.2. Updating your Profile

In the SWAP Contractor Portal, click on the icon 'My Profile' at any time to update your personal information, enable work as a technician, and your competencies.



You can update:

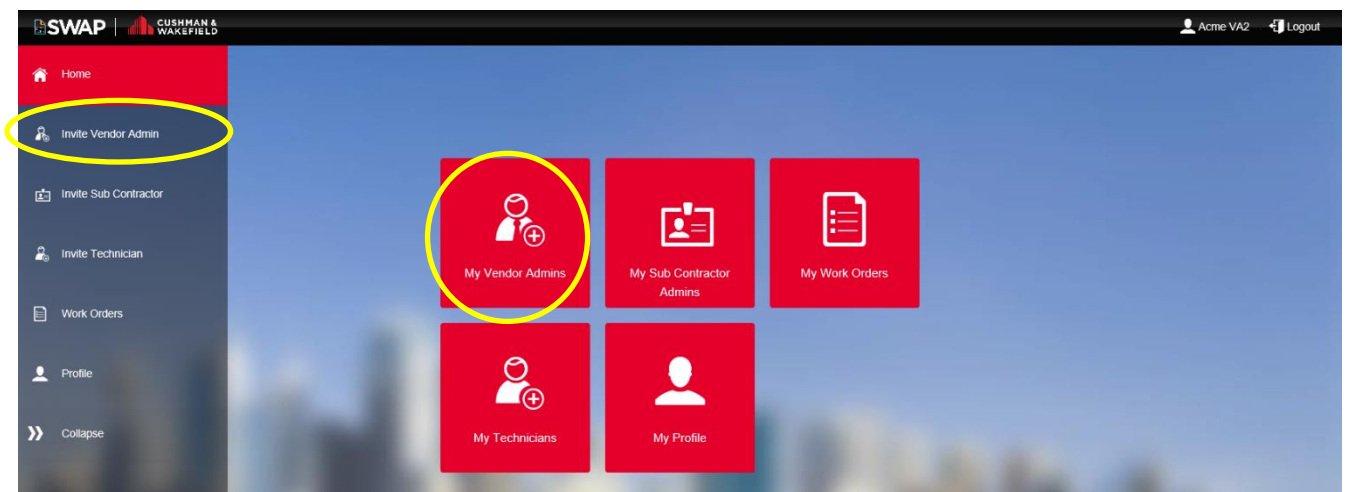
- Name
- Phone Number
- Password
- Elect to work in SWAP as a technician
- Add competencies



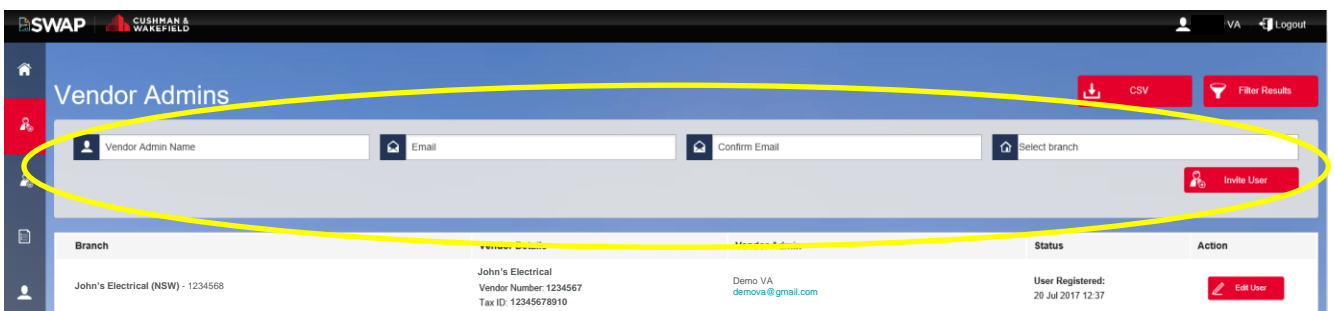
7.0 Invite Additional Vendor Administrators

Your business may require more than one Vendor Administrator. Cushman & Wakefield issues an invitation to one Vendor Administrator per company. Once the Vendor Administrator has registered in SWAP, they can invite more Vendor Admins for your business. **Note that all Vendor Admins have the same access and views.**

Invite a Vendor Admin by clicking on the My Vendor Admins tab.



Add the vendor admin name and email address and select 'invite user'. You can only invite one Vendor Admin at a time. To Select Branch, see [Allocating Vendor Branches to New Vendor Administrators](#)



7.1. Allocating Vendor Administrators to Vendor Branch/es

The Vendor Branch function allows Vendor Administrators to filter work orders received by branch (a region or area determined by your company) rather than all work orders allocated to the vendor company. You can allocate multiple Vendor Branches to one Vendor Administrator. The Branch list is based on branches identified in RapidGlobal, or where indicated during the Cushman & Wakefield contractor registration process.

While it is not mandatory to allocate Vendor Branches to your Vendor Administrators, it provides you with greater visibility of the specific work orders allocated to you, providing you better efficiency when to assigning work orders to technicians.

7.1.1. How Vendor Branches Work

In the example, Company XYZ has three branches – Branch A, Branch B and Branch C:

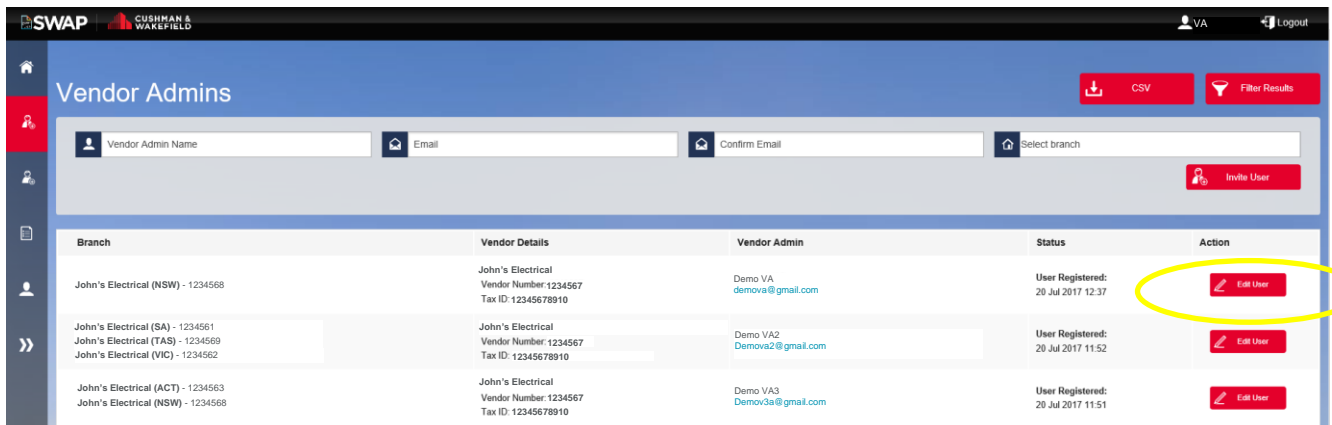
Y = can view work order N = cannot view work order

	VA No Branches	VA allocated Branch A	VA allocated Branch C	VA allocated Branch B and C	VA allocated Branch A and B
Work order issued to Branch A	Y	Y	N	N	Y
Work order issued to Branch B	Y	N	N	Y	Y
Work order issued to Branch C	Y	N	Y	Y	N

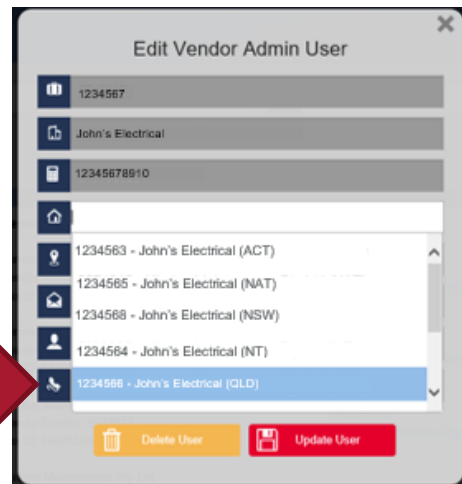
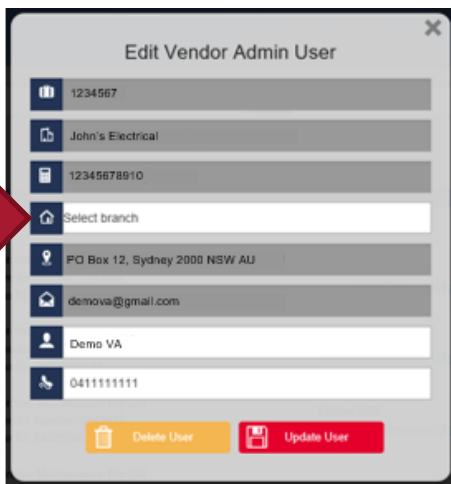
7.1.2. Allocating Vendor Branches to Existing Vendor Administrators

Note: These instructions are for adding branches to Vendor Administrators already invited to SWAP

To allocate Branches to a Vendor Administrator, go to My Vendor Admins and select Edit User next to the Vendor's name.

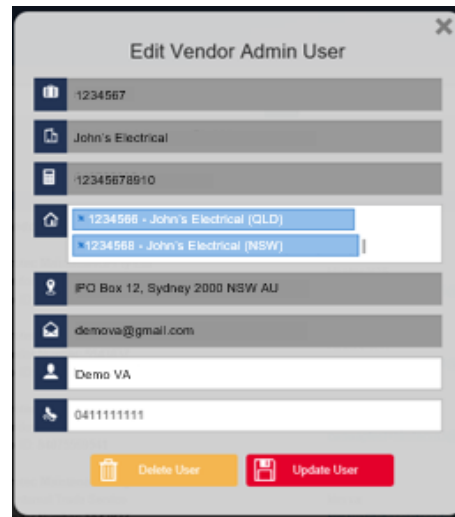


Click on the the Select Branch field to choose the branches to allocate





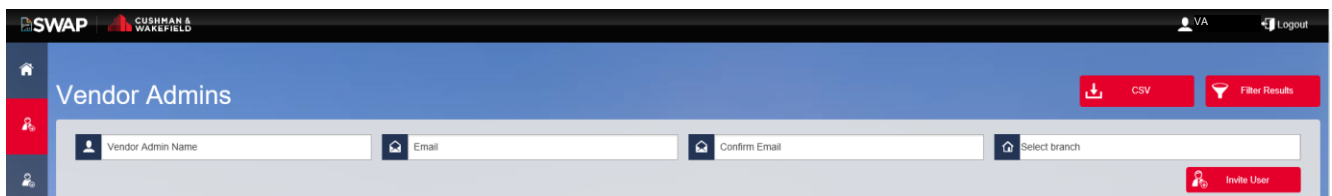
To select multiple, click in white area of the Select Branch field again and choose another branch



To remove a branch, click on the x next to the Branch to be removed. When done, click Update User

7.1.3. Allocating Vendor Branches to New Vendor Administrators

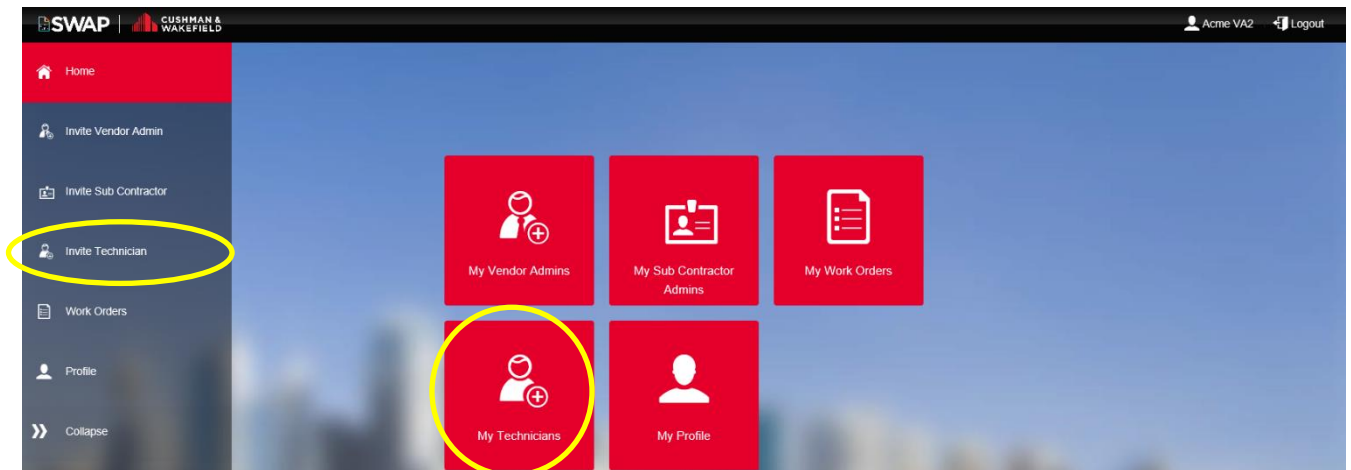
Note: These instructions are for adding branches to Vendor Administrators who are being invited to SWAP for the first time



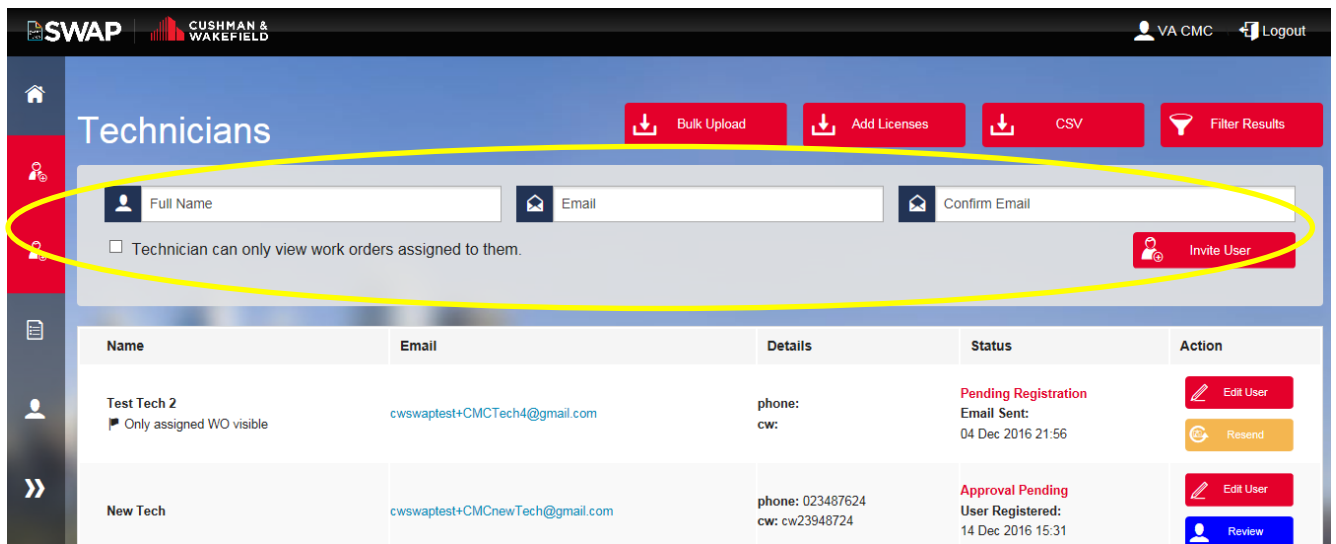
Enter the Vendor Admin's full name, email address, and confirm email address. To allocate a branch, click on Select branch and choose from the dropdown list. To add multiple branches, click in the field again to bring up and dropdown menu to select another branch.

8.0 Invite Technicians and Workers

To invite all your technicians and workers to SWAP, click on My Technicians.



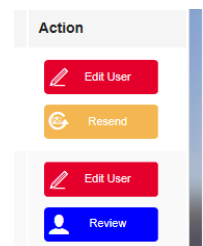
Add the technician's full name and email address. You have the option of checking the "Technician can only view work order assigned to them" checkbox. See [Technician can only view work order assigned to them checkbox](#) for more info. Select Invite User.



On the right of the screen of each technician at any time you can:

- **Edit user** – update the technician user details and settings
- **Resend** the invitation for those technicians who have lost the registration email
- **Review** technician competencies

Once invited, the technician will appear in the list below, with a status of 'Pending Registration'. Once the technician has completed registration, it will change to 'Approval Pending'. When the VA has completed Review, it will change to 'Approved'.

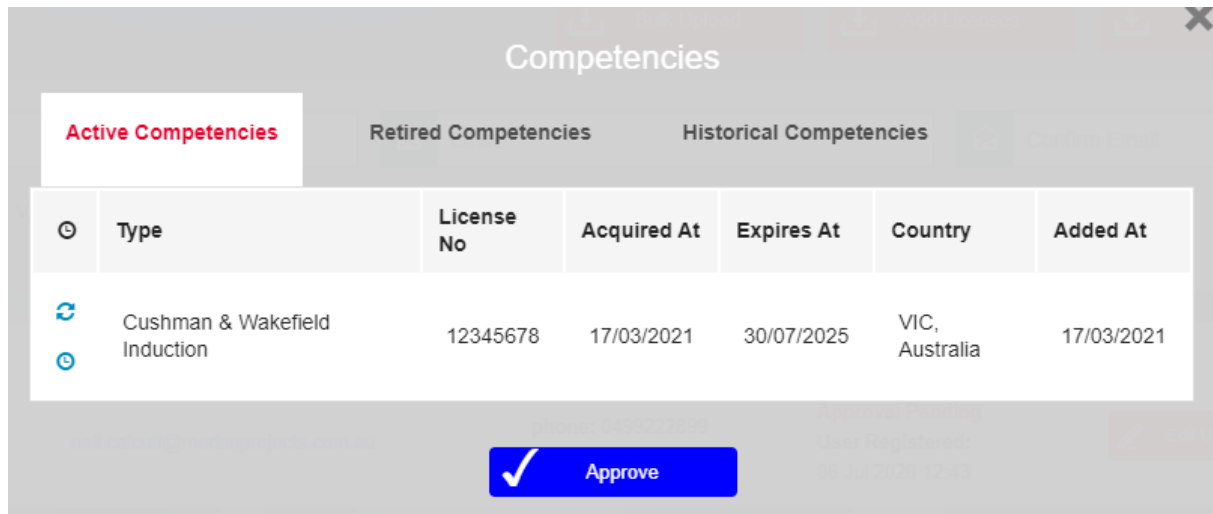


8.1. Review Competencies

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

Andrew Miller	cswaptest-andrewmiller@gmail.com	phone: cw:	Approval Pending User Registered: 07 Dec 2018 09:53	Edit User Review
BillWhites Tech	cswaptest+billwhitestech@gmail.com	phone: cw:	Approved User Registered: 29 Nov 2018 10:36	Edit User View

Review the competencies and approve if legitimate.



Once approved the status will be updated to 'Approved'.

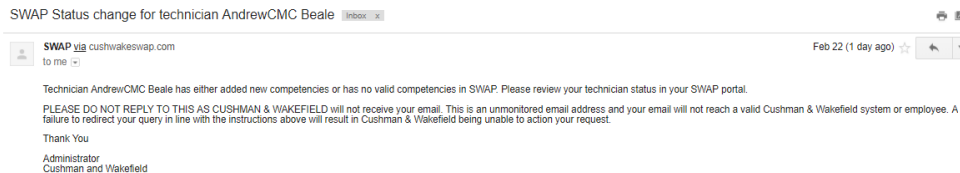
Approved
User Registered:
07 Dec 2018 09:53

Edit User
View

Note: When a technician uploads new or updated competencies, the vendor administrator needs to review them before they are able to allocate jobs to the technician.

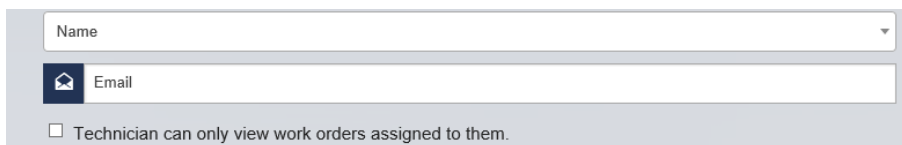
8.1.1. Notification of Updated Competencies

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



8.2. Technician Only Views Assigned Work Orders Feature

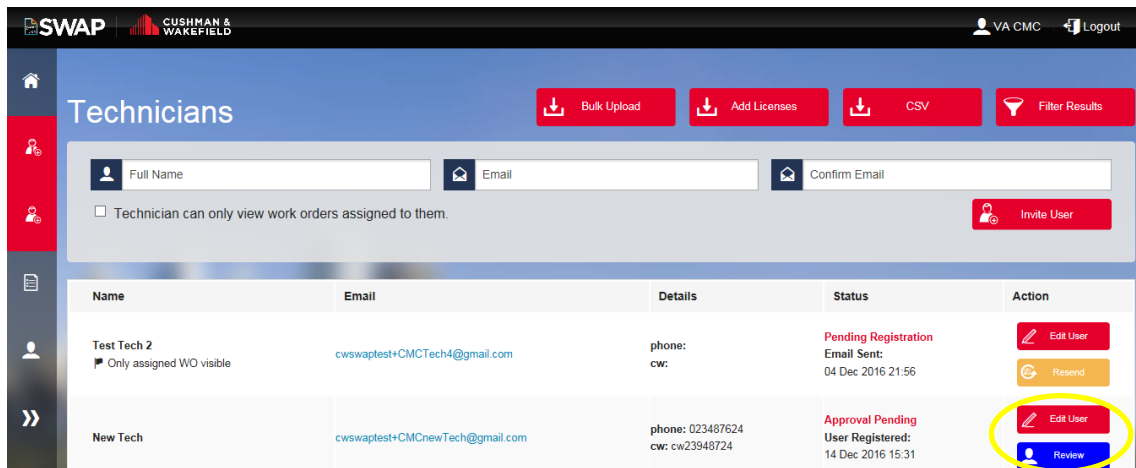
To enable technicians to only view work orders assigned to them by a vendor administrator, check "Technician can only view work order assigned to them". If this has not been checked, they will be able to see all work orders issued to the vendor company under the Check In/Out tile on the app. This is useful for technicians working afterhours or on call.



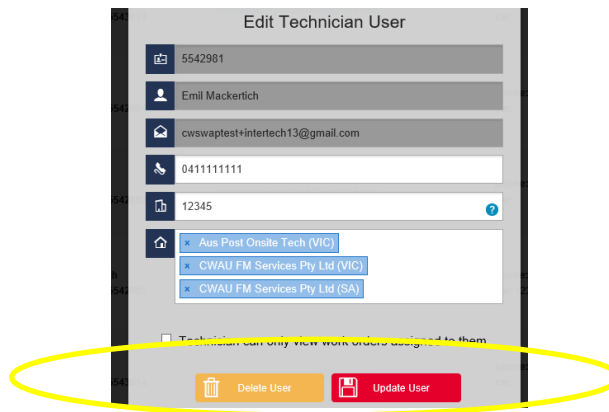
For afterhours shifts, this checkbox should be unchecked to access all work orders. This can be changed via the technician profile on the Vendor Portal see [After Hours Work Order Assignment](#)

8.2.1. After Hours Work Order Assignment

To enable a technician to view all work orders issued to a vendor company for an afterhours/on call shift, the Vendor Administrator must log onto the SWAP Portal and go to My Technicians.



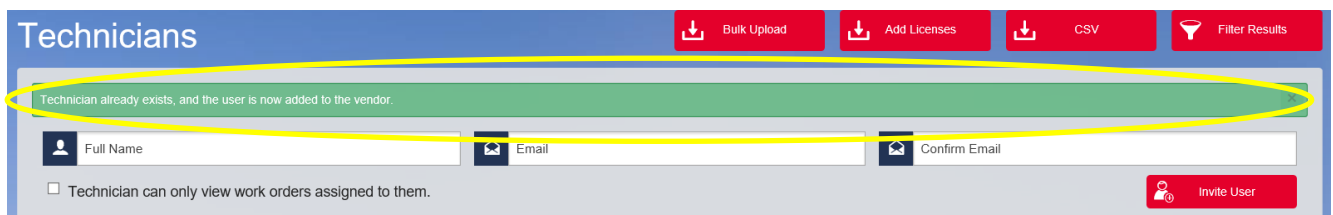
Find the technician (tip: use the [Filter Results](#) button) and click on the Edit User button. Check the “Technician can only view work order assigned to them” checkbox, and click Update User.



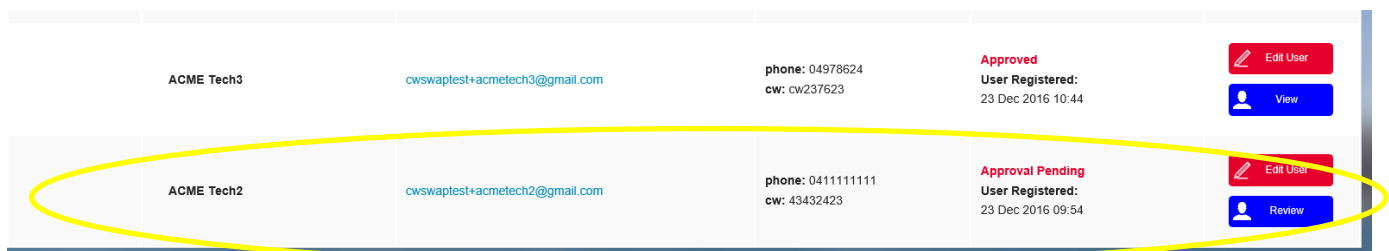
When the technician’s shift has ended, follow the same instruction as above to change the tech’s access back to assigned work orders only.

8.3. How to Invite Technicians for Multiple ABN Vendor Companies

If your company operates across multiple ABN, each ABN is set up as a different Vendor Company in the SWAP system. A technician that has been invited to one Vendor Company can be invited to another. Invite the technician as per the instructions in [Invite Technicians and Workers](#). When a technician has previously been invited and registered into SWAP, the following message appears after you click ‘Invite’.



The technician has now been added to your vendor company, and the tech does not need to reregister. To be able to allocate work to the technician, you still need to approve their competencies. Find them in your technician list and click on ‘Review’ to review their competencies.



If the technician requires additional competencies to be allocated jobs for your ABN, please inform the technician so they can upload the required competencies.

8.4. Adding Technicians to Vendor Branches

If you are a Vendor Administrator who has been allocated to a Vendor Branch, technicians you invite will only be visible for that Branch. Vendor Administrators in other Branches will not be able to see or allocate jobs to that technician. Only a Vendor Administrator with no allocated branches can view them. If the Vendor Admin also allocates the technician to another branch will that Vendor Admin be able to see the technician under their list.

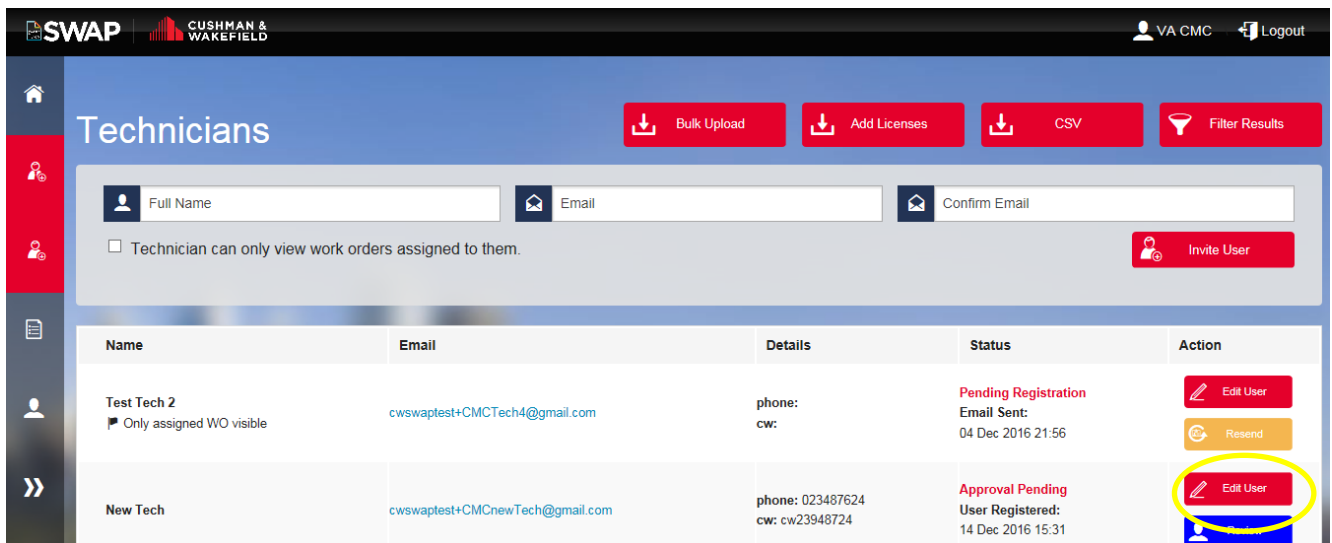
How Vendor Branches work: In the example, Company XYZ has four branches – Branch A, Branch B, Branch C, Branch D:

Y = can view technician N = cannot view technician

	VA – no branches	VA allocated Branch A only	VA allocated Branch C only	VA allocated Branch B & C	VA allocated Branch A & B	VA allocated Branch D only
No branch VA invites techs	Y	Y	Y	Y	Y	Y
Branch A VA invites techs	Y	Y	N	N	Y	N
Branch C VA invites techs	Y	N	Y	Y	N	N
Branch B and C VA invites techs	Y	N	Y	Y	Y	N
Branch A and B VA invites techs	Y	Y	N	Y	Y	N
Branch D VA invites techs	Y	N	N	N	N	Y

8.4.1. Adding Technicians from other Branches to your Branch

To assign work to a technician from another branch, contact that Branch Vendor Administrator. They will edit the technician's profile and add the new branch to the technician, which will allow you to see them in your branch.

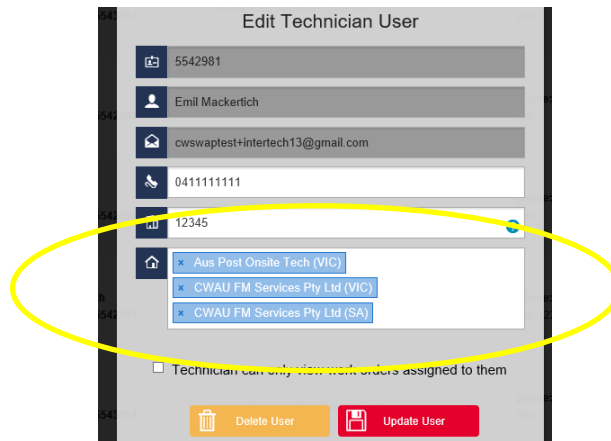


The screenshot shows the 'Technicians' management page in the SWAP system. At the top, there are navigation icons and user information (VA CMC, Logout). Below the header, there are buttons for 'Bulk Upload', 'Add Licenses', 'CSV', and 'Filter Results'. A search section includes input fields for 'Full Name', 'Email', and 'Confirm Email', along with a checkbox for 'Technician can only view work orders assigned to them.' and an 'Invite User' button. The main content is a table with the following data:

Name	Email	Details	Status	Action
Test Tech 2 Only assigned WO visible	cswaptest+CMCTech4@gmail.com	phone: cw:	Pending Registration Email Sent: 04 Dec 2016 21:56	Edit User Resend
New Tech	cswaptest+CMCNewTech@gmail.com	phone: 023487624 cw: cw23948724	Approval Pending User Registered: 14 Dec 2016 15:31	Edit User

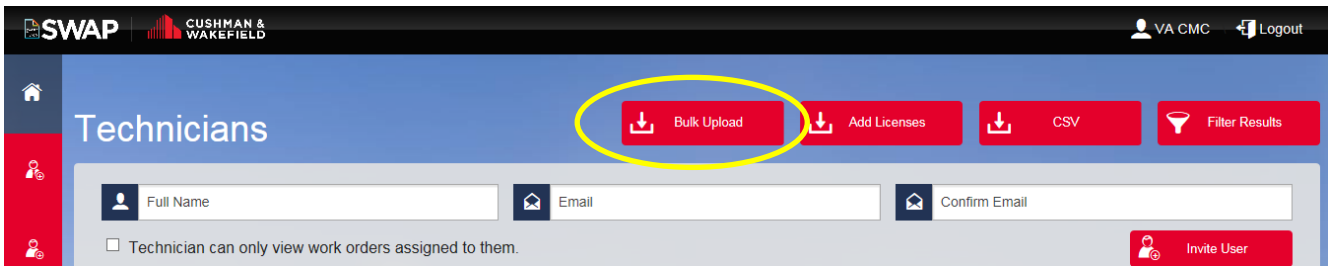
Search through the list of technicians for the tech who will be on call. (Tip: use the [Filter Results](#) button to search for the name). When you have found the tech, click on the Edit User button next to their name.

Click in the Branches field and select the new branch from the dropdown list (see [Adding Technicians to Vendor Branches](#)). When done, Update User.

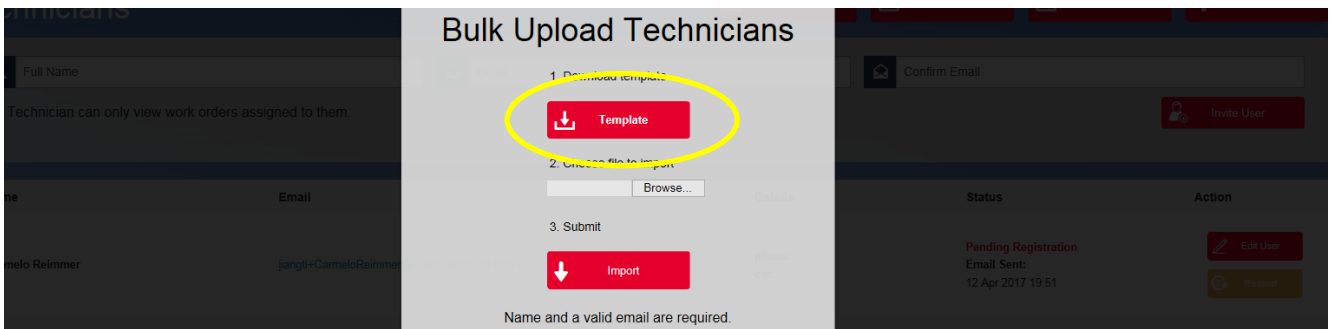


8.5. Bulk Invite Technicians and Workers to SWAP

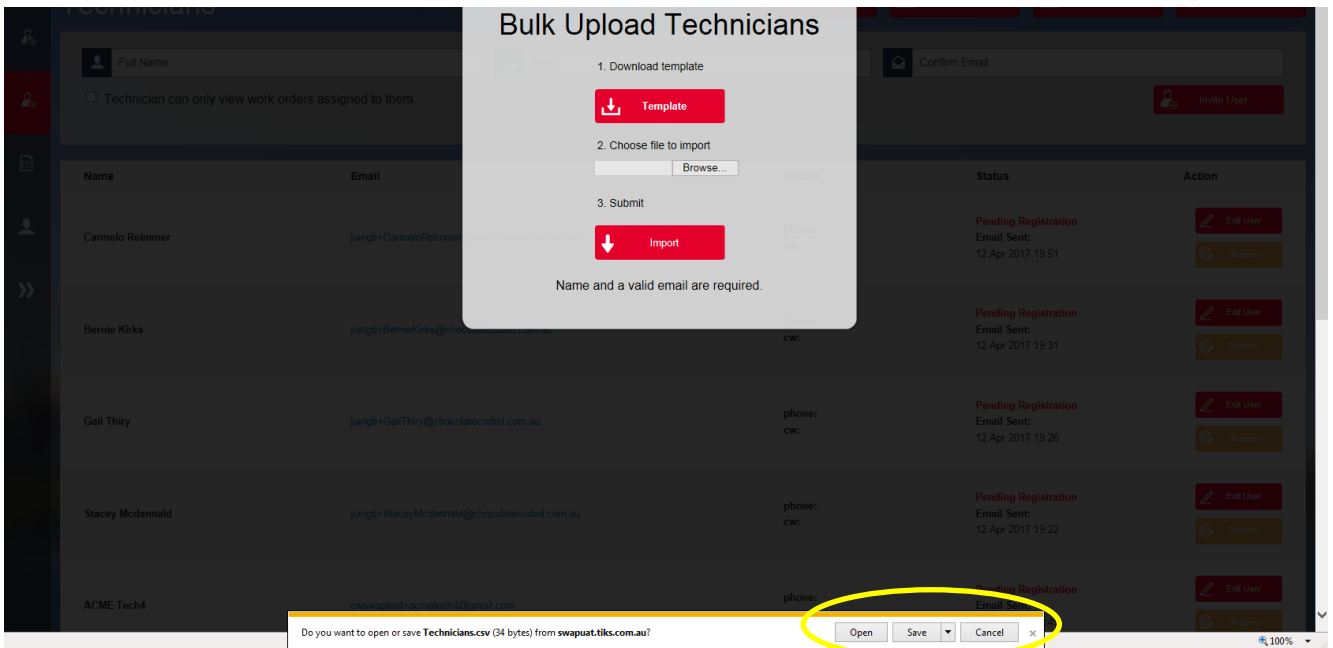
To bulk invite technicians, go to My Technicians. At the top right of the screen you will see a Bulk Upload button. Click on this to download the .csv file required to fill in technician information.



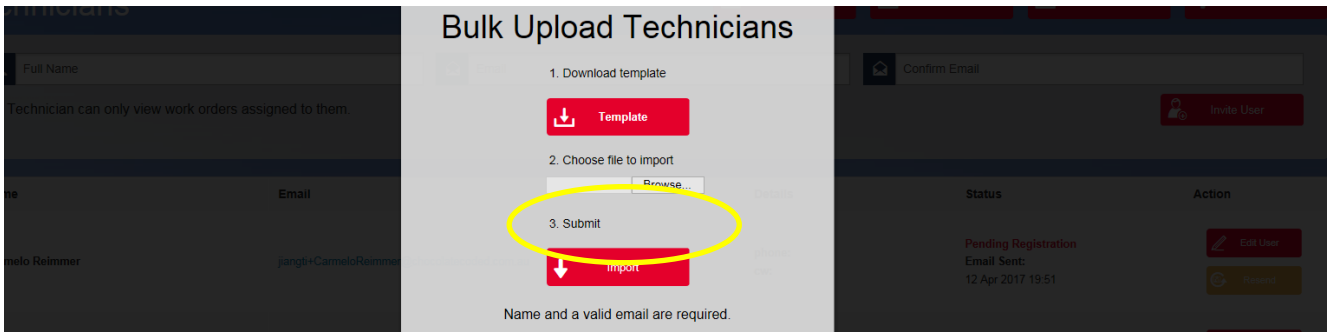
Choose Download Template to download the template to your desktop.



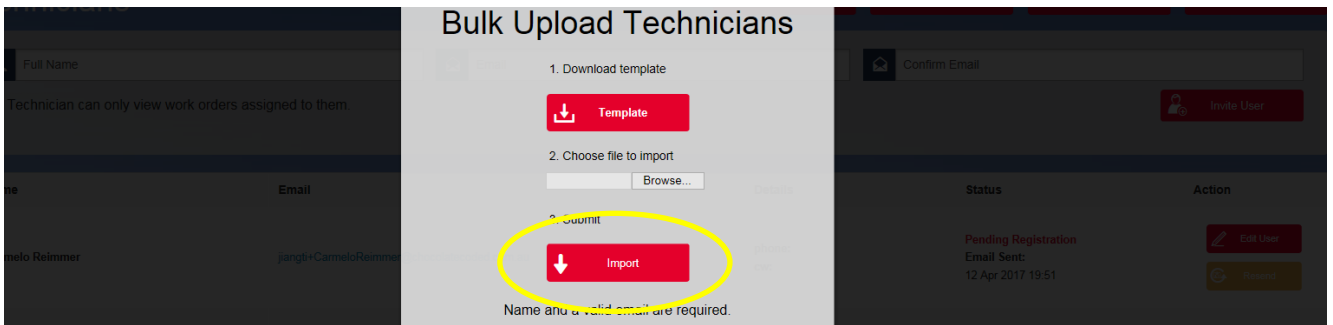
Download the file to your desktop



Fill out the technician details in the Excel spreadsheet and save. Then go back to the Portal page to import the file

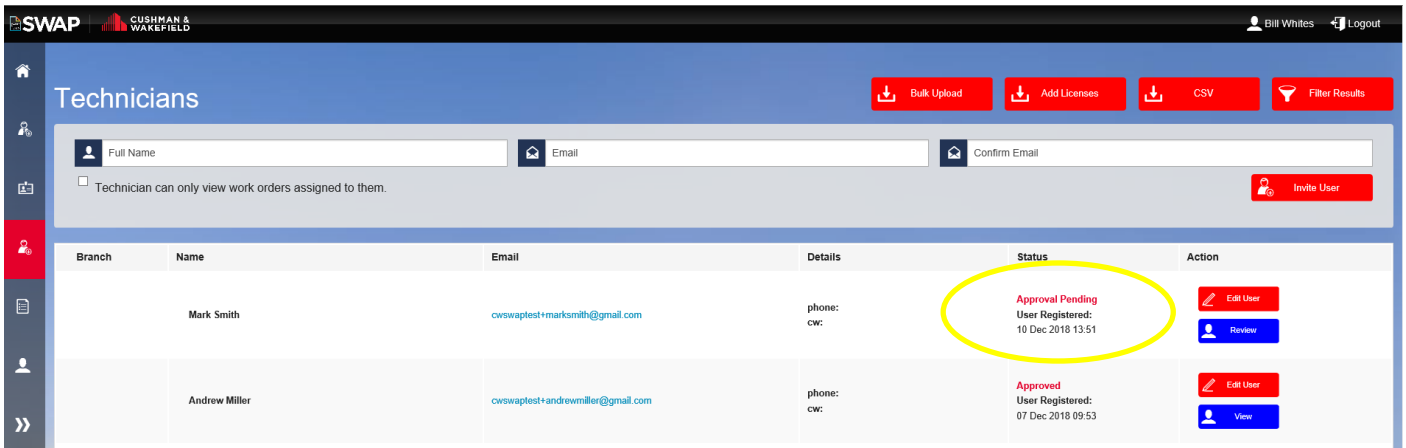


Click on Import to submit the file. It will send out registration invitations to all technicians listed within the file.

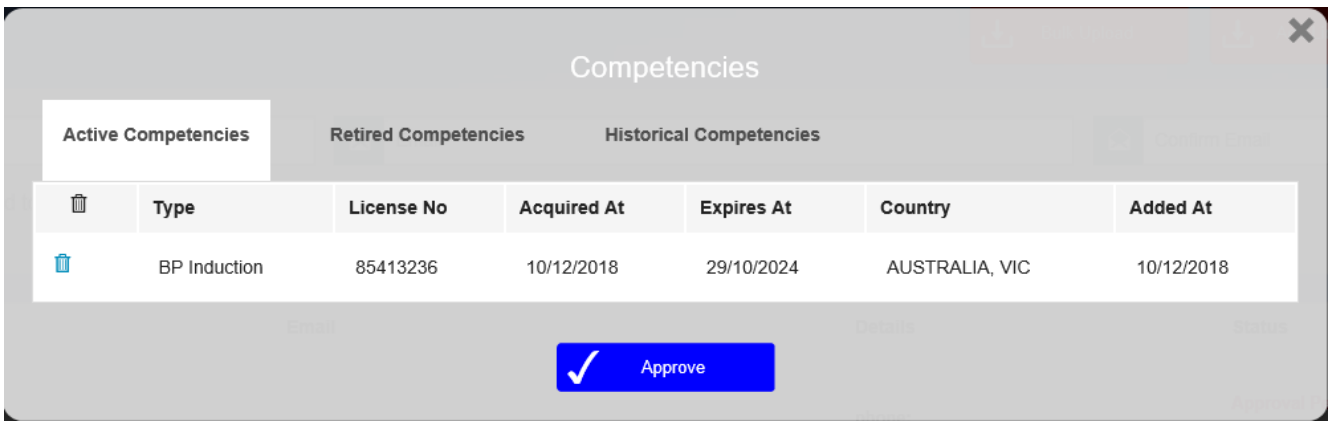


8.6. Approving Technician and Worker Competencies

Once a technician is registered and has uploaded their qualifications, the Vendor Administrator must review and approve it to complete the technician's registration. Go to My Technicians to view technicians with Approval Pending.



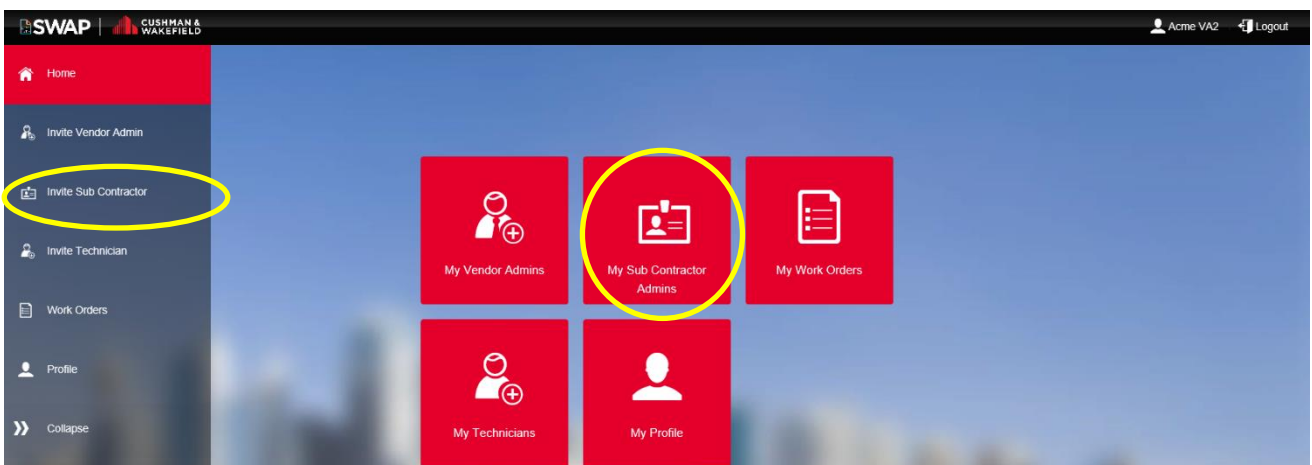
To conduct the review, simply click on Review to review the competencies the technician has uploaded



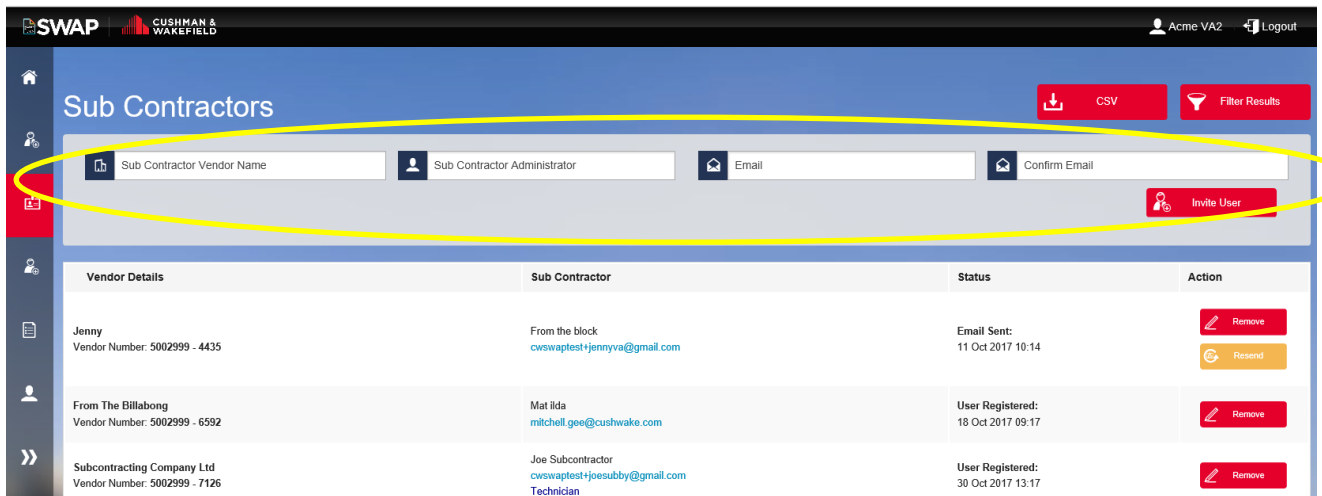
If the competencies are correct, click approved. Now the technician can be assigned work orders.

9.0 Invite Subcontractor Admins

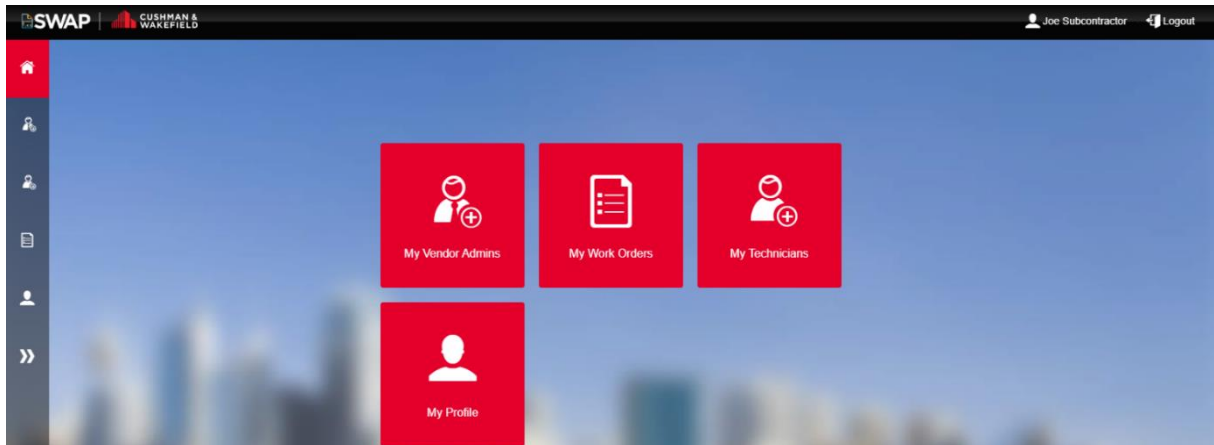
Inviting a Subcontractor Admin allows you to allocate work to your subcontractors. The Subcontractor VA registers and then invites all their technicians. They can manage the work order via their own SWAP Vendor Admin Portal. The original VA will still have visibility over the work order while it is subcontracted out. Once the work order is closed, it will close in both portals. To invite a subcontracting company, select My Sub Contractor Admins on the dashboard



Fill out the Sub Contractor Vendor (Company) Name, the name of the nominated Sub Contractor Vendor Administrator and their email address. Click Invite User to send them an invitation



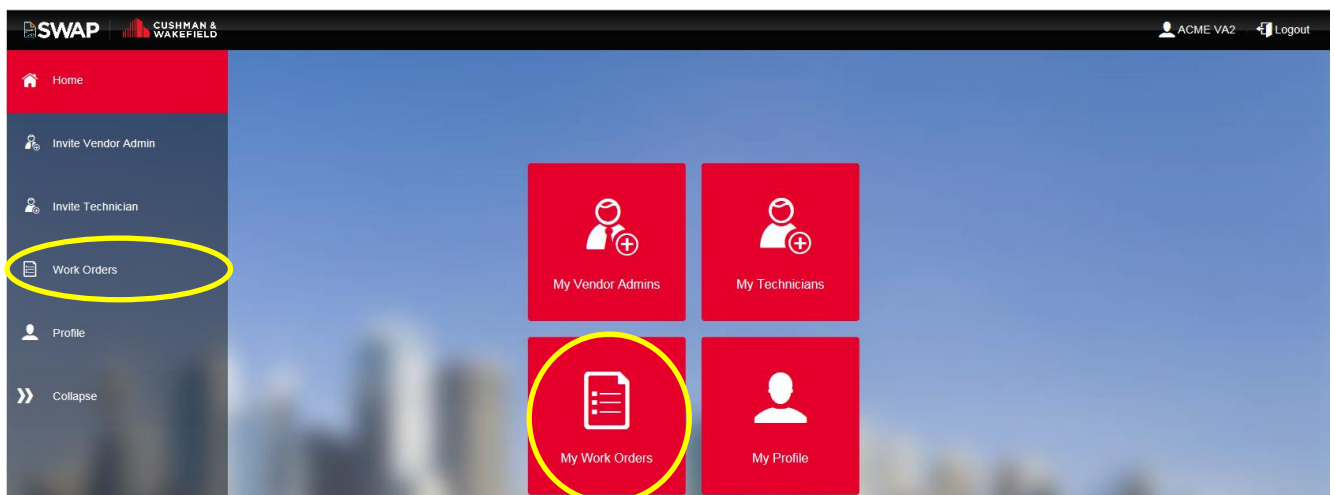
9.1. Subcontractor Vendor Admin Dashboard



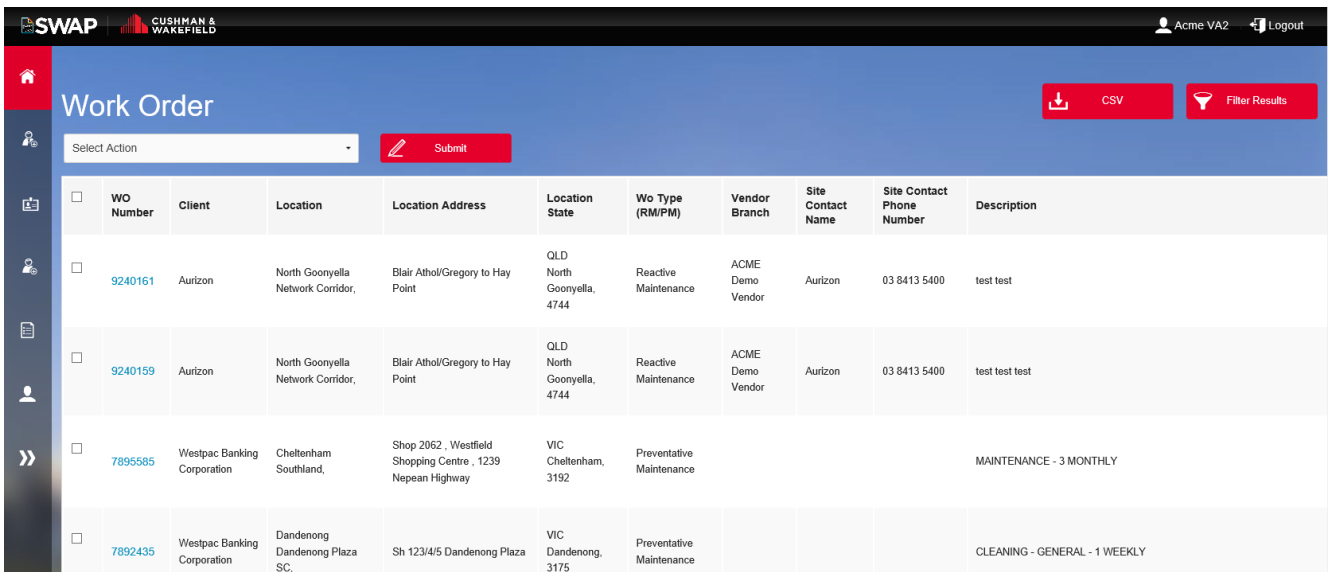
Note: Subcontractor Admins follow the same instructions as listed in the Vendor Administrator User Guide for all tasks. However, if a work order has been subcontracted, it cannot be subcontracted to another subcontractor.

10.0 Manage Work Orders

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



The Work Order screen main view:

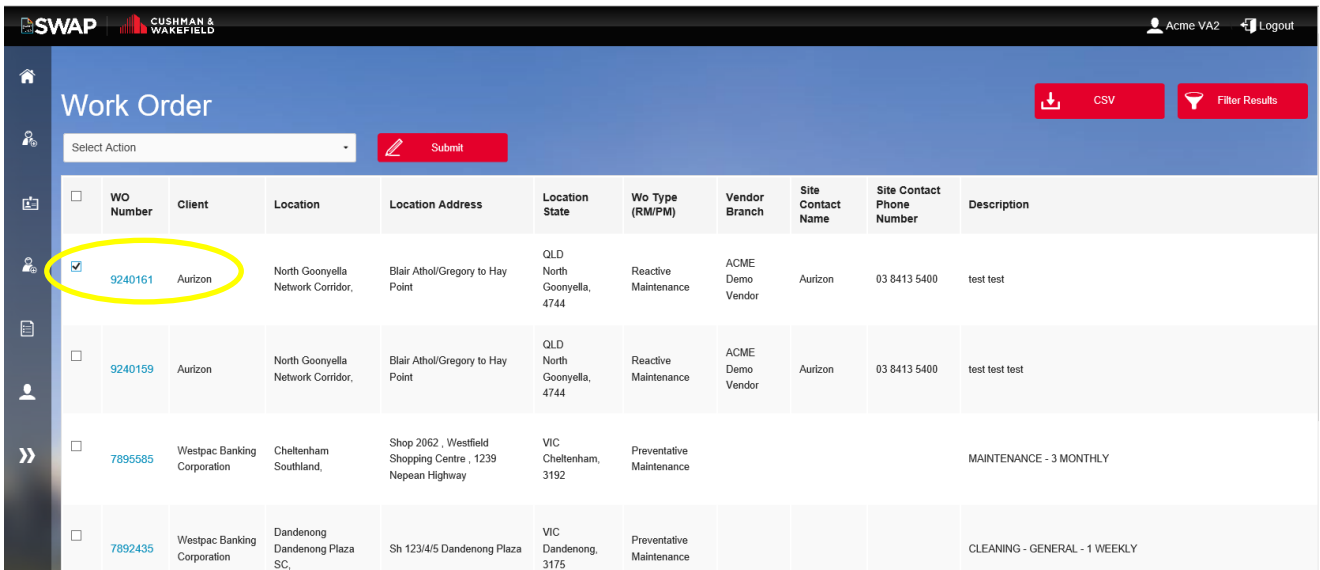


WO Number	Client	Location	Location Address	Location State	Wo Type (RM/PM)	Vendor Branch	Site Contact Name	Site Contact Phone Number	Description
9240161	Aurizon	North Goonyella Network Corridor,	Blair Athol/Gregory to Hay Point	QLD North Goonyella, 4744	Reactive Maintenance	ACME Demo Vendor	Aurizon	03 8413 5400	test test
9240159	Aurizon	North Goonyella Network Corridor,	Blair Athol/Gregory to Hay Point	QLD North Goonyella, 4744	Reactive Maintenance	ACME Demo Vendor	Aurizon	03 8413 5400	test test test
7895585	Westpac Banking Corporation	Cheltenham Southland,	Shop 2062 , Westfield Shopping Centre , 1239 Nepean Highway	VIC Cheltenham, 3192	Preventative Maintenance				MAINTENANCE - 3 MONTHLY
7892435	Westpac Banking Corporation	Dandenong Dandenong Plaza SC,	Sh 1234/5 Dandenong Plaza	VIC Dandenong, 3175	Preventative Maintenance				CLEANING - GENERAL - 1 WEEKLY

10.1. In-House Work Order Management (No Subcontracting)

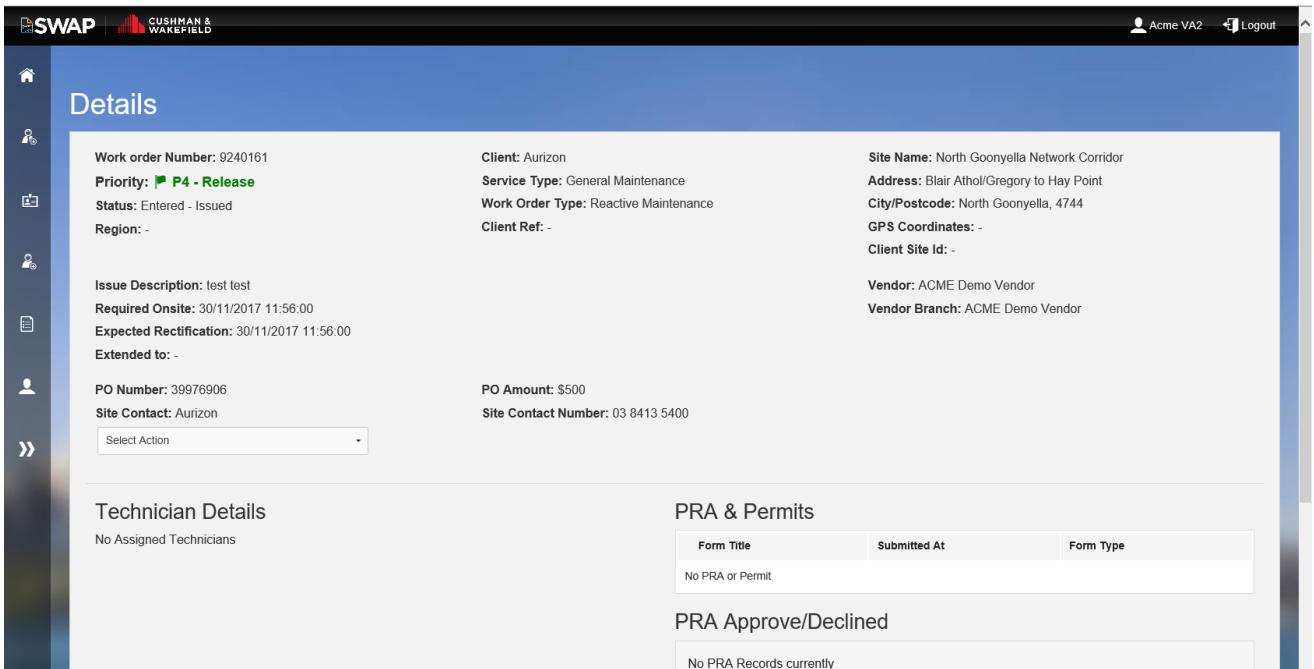
10.1.1. Assign a Work Order to a Technician

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

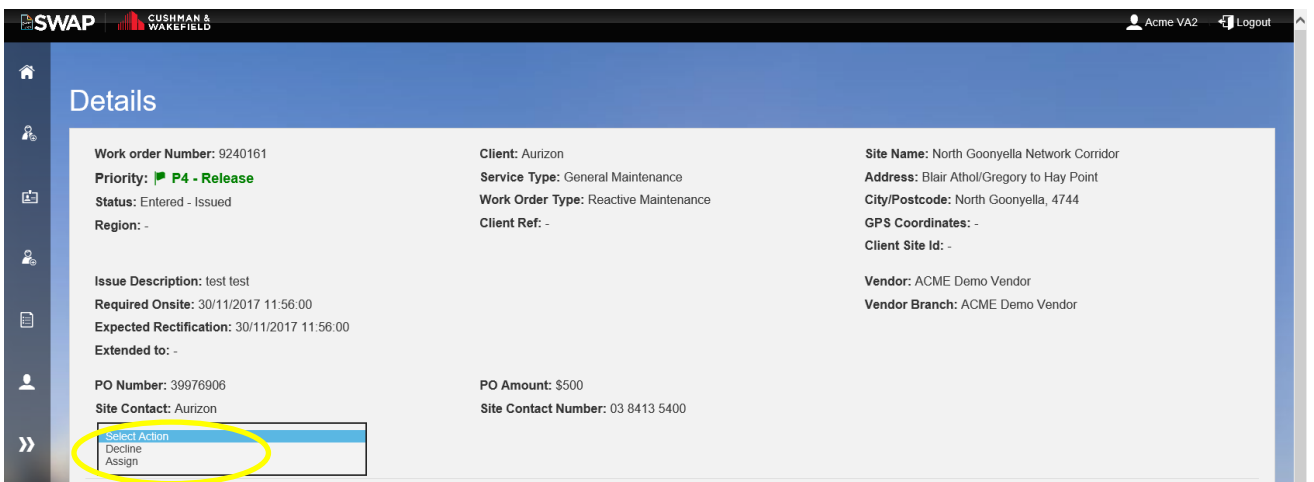


WO Number	Client	Location	Location Address	Location State	Wo Type (RM/PM)	Vendor Branch	Site Contact Name	Site Contact Phone Number	Description
<input checked="" type="checkbox"/> 9240161	Aurizon	North Goonyella Network Corridor,	Blair Athol/Gregory to Hay Point	QLD North Goonyella, 4744	Reactive Maintenance	ACME Demo Vendor	Aurizon	03 8413 5400	test test
<input type="checkbox"/> 9240159	Aurizon	North Goonyella Network Corridor,	Blair Athol/Gregory to Hay Point	QLD North Goonyella, 4744	Reactive Maintenance	ACME Demo Vendor	Aurizon	03 8413 5400	test test test
<input type="checkbox"/> 7895585	Westpac Banking Corporation	Cheltenham Southland,	Shop 2062 , Westfield Shopping Centre , 1239 Nepean Highway	VIC Cheltenham, 3192	Preventative Maintenance				MAINTENANCE - 3 MONTHLY
<input type="checkbox"/> 7892435	Westpac Banking Corporation	Dandenong Dandenong Plaza SC,	Sh 1234/5 Dandenong Plaza	VIC Dandenong, 3175	Preventative Maintenance				CLEANING - GENERAL - 1 WEEKLY

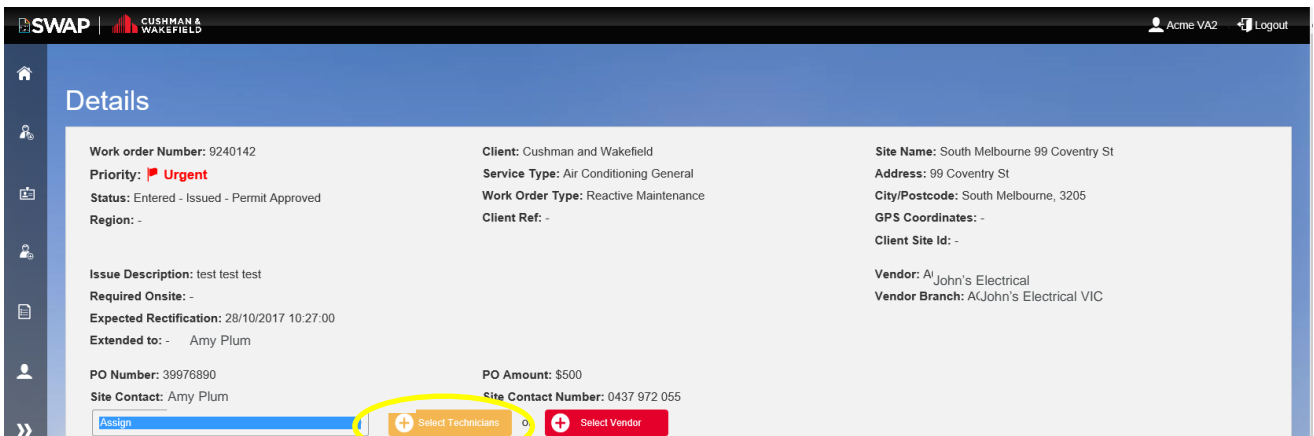
This will take you to the details screen:



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



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



A full list of your technicians will appear:

SWAP User Guide - Vendor Administrator + Technician

Service Line: Global Technology Solutions

Number: ANZ-GTS-SI-2005

Rev No: 13.4

Publish Date: 12-Jan-21



	Technician Name	License Name	License #	Issue Date	Expiry Date	Country	Region
<input type="checkbox"/>	Greg P	Cushman & Wakefield Induction	55115669	01/10/2019	-	Australia	VIC
<input type="checkbox"/>	John Smith	Contractor Licence	456345234	08/04/2018	10/04/2022	Australia	VIC
<input type="checkbox"/>	Prashant Tech1	EWP less than 11m - Yellow Card	yc117163	28/08/2019	-	Australia	QLD
<input type="checkbox"/>	Test Tech3	Safe Access to Rail Corridor (SARC) induction	123	01/10/2016	-	Australia	QLD
		Not Applicable	-	-	21/06/2018	Australia	QLD
		[Other Plumbing Licence] Plumber	45452555	-	30/06/2017	Australia	QLD
		Other licence or qualification	2222222	04/06/2018	27/06/2018	Australia	VIC
<input type="checkbox"/>	Test Tech4	Cushman & Wakefield Induction	123456789	17/03/2021	12/11/2025	Australia	VIC
		[Other Plumbing Licence] Plumber	123456789	17/03/2021	11/06/2024	Australia	VIC
<input type="checkbox"/>	test vendor	Not Applicable	-	01/10/2020	07/04/2022	Australia	VIC

✎ Submit

- To assign the work order to a technician, tick the tick box next to their name and click the red 'Submit' button. If you have a large list of technicians, you can use the filter at the top to find a technician.
- If you need to assign a technician with an expired competency, they can update their details in real time, so you can approve their changes and allocate a work order immediately. Select the technician and click Submit to assign it to them. Once you have assigned a work order to a technician, it will appear on their SWAP app under My Work Orders.

Note: If a technician is greyed out, you will be able to hover over the **i** icon to check why they are ineligible to be assigned the work order. This may be due to:

- A technician not having one or more [mandatory competency](#)

i	Prashant Tech1	EWP less than 11m - Yellow Card	yc117163	28/08/2019	-	Australia	QLD
i	This technician is uneligible to be assigned this work order, as they have following missing mandatory competencies * [Other Plumbing Licence] Drainer						QLD

- A technician has one more [expired competencies](#) and needs to update them.

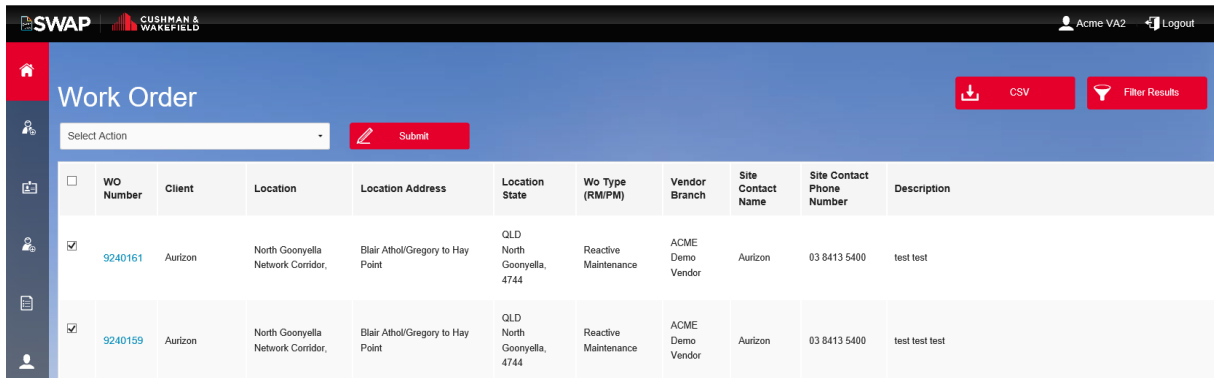
i	Test Tech2	Other licence or qualification	123	10/06/2014	01/02/2019	Australia	VIC
i	This technician has the following expired competencies, which require updating * Competency Other licence or qualification expired at 2019-02-01						VIC

- The technician is on ['Approval Pending'](#) status

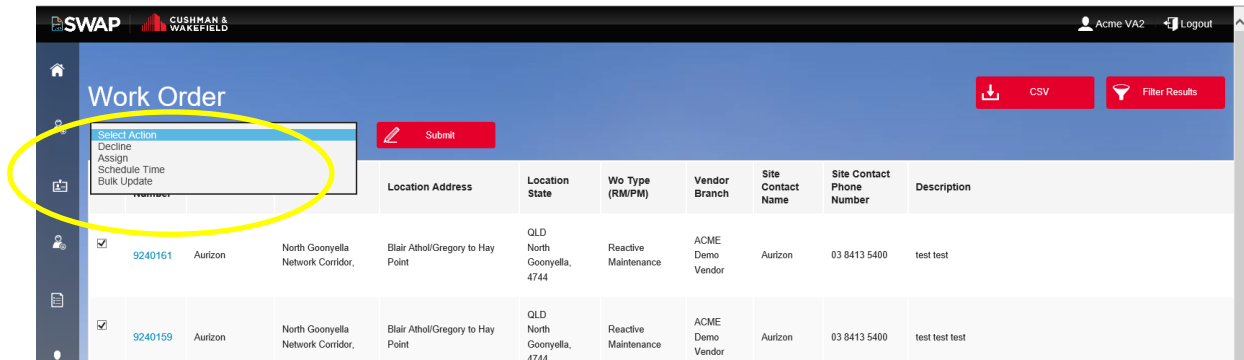
	Test Tech4	Cushman & Wakefield Induction	123456789	17/03/2021	12/11/2025	Australia	VIC
Technician requires approval from vendor.		[Other Plumbing Licence] Plumber	123456789	17/03/2021	11/06/2024	Australia	VIC

10.1.2. Bulk Assigning Work Orders to Technicians

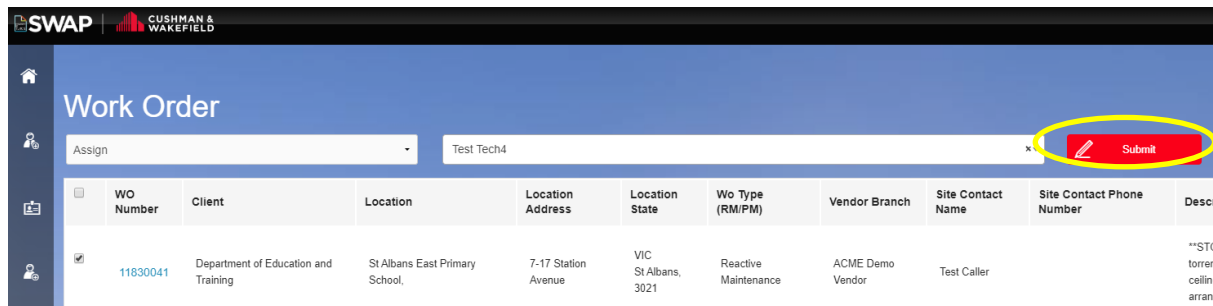
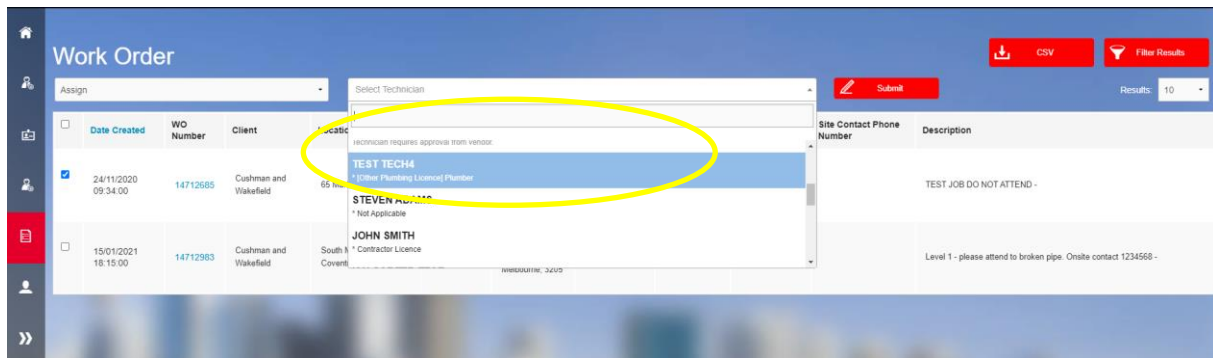
You can bulk assign a work order by Filtering by a client and selecting the work orders you would like to assign to one technician. You can assign a work to more than one registered technician by selecting the same work order and adding additional technicians.



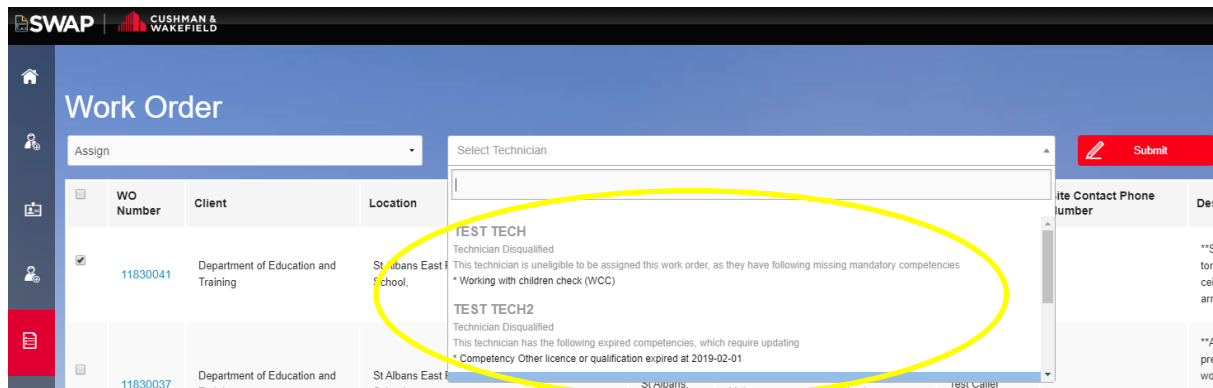
Then from the Select Action drop down, choose to:



When you select Assign or Schedule Time, select the Technician to assign to the job. Click Submit when done

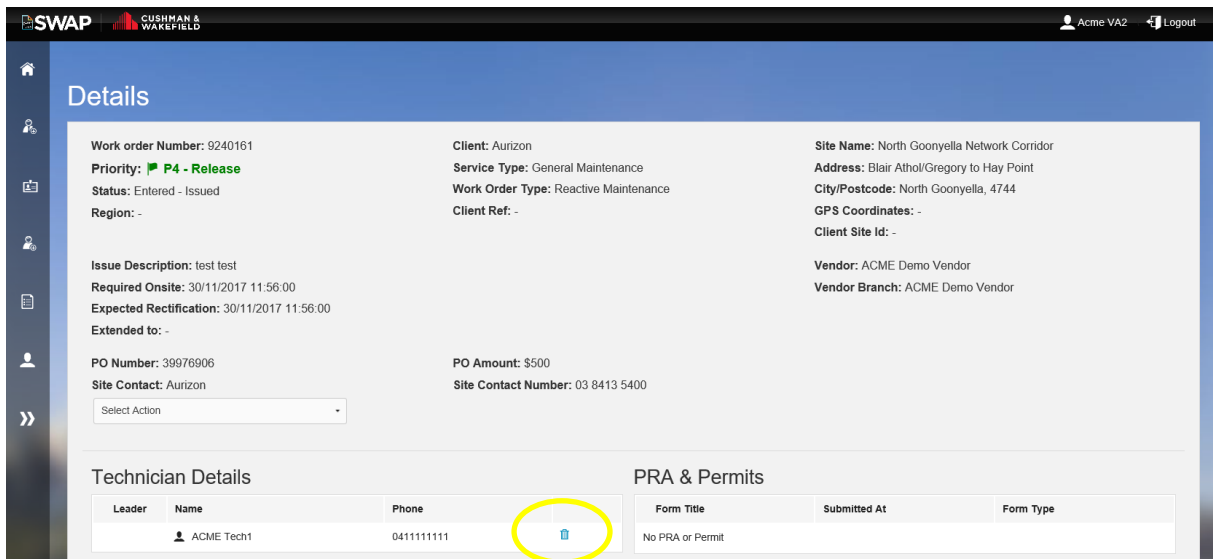


Note: If a technician is disqualified, there will be a note under their name advising of why they are ineligible to be assigned the work order. This may be due to them having an Expired competency, a missing Mandatory Competency or may be that they are on 'Approval Pending' status.

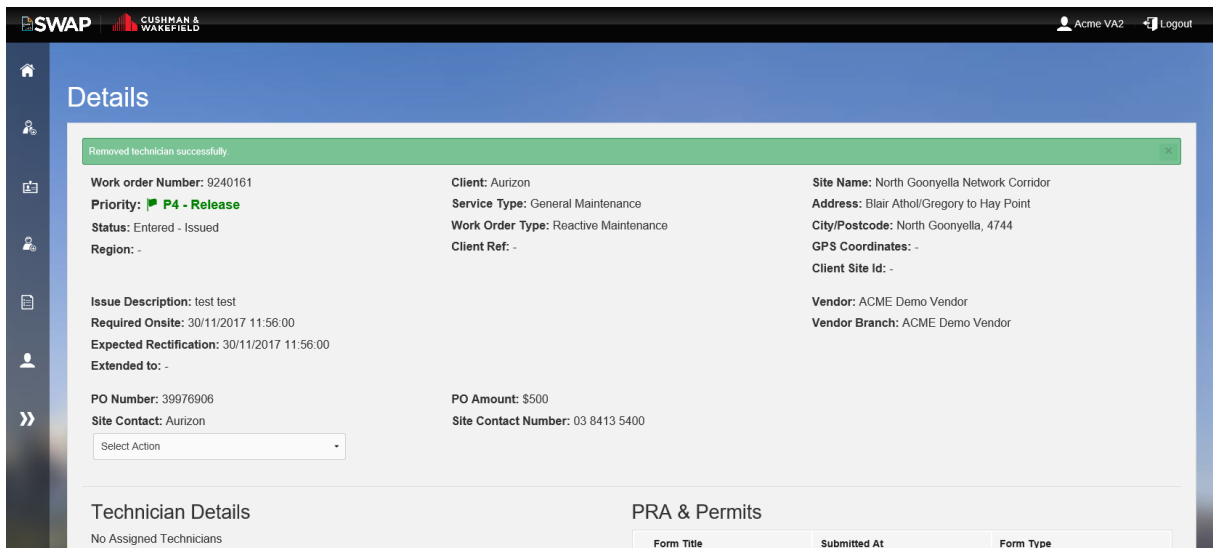


10.1.3. Reassign a Work Order/Remove Technician from Work Order

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



The technician is removed.



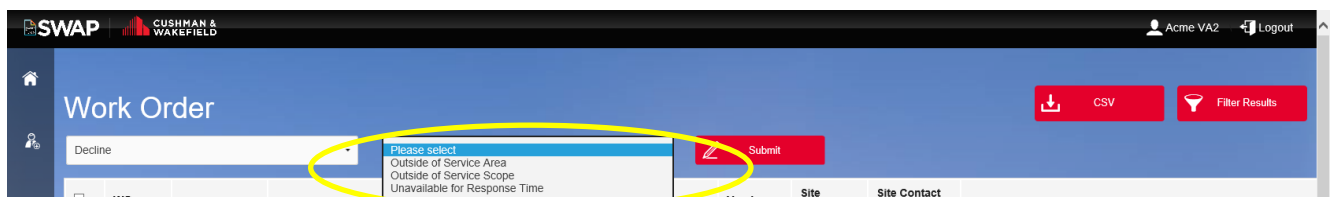
To reassign to another technician, follow the instructions in [Assign a Work Order to a Technician](#)

10.1.4. Add Additional Technicians to an Open Work Order

To add additional technicians at any stage of a work order, follow the instructions in [Assign a Work Order to a Technician](#)

10.1.5. Decline a Work Order

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



The list of decline reasons is sometimes updated, so there may be additional options when you attempt to decline a work order.

Once you have selected the reason for declining a work order, a comment box will populate to allow you to advise in detail why the works have been declined.

Work Order

Decline Outside of Service Area Decline comment Submit

NOTE: If you're declining a work order that requires attendance and rectification within 24hrs, then you must call through to the CXC

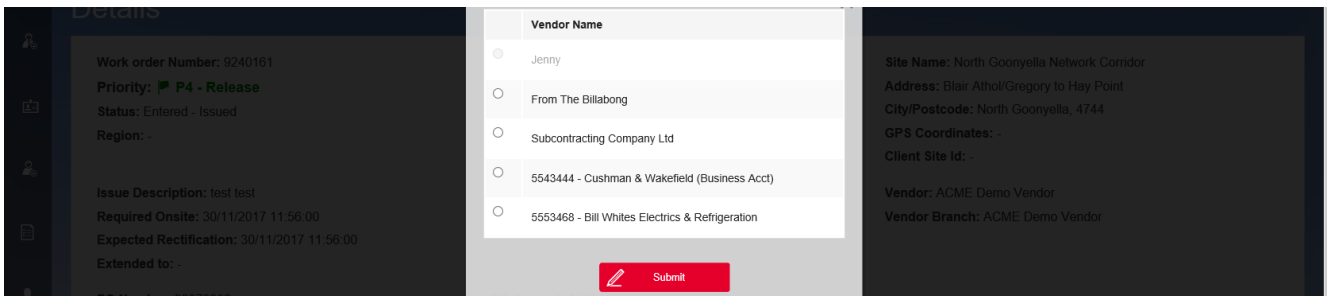
10.2. Subcontractor Admin Work Order Management

10.2.1. Assigning a Work Order to a Subcontractor Admin

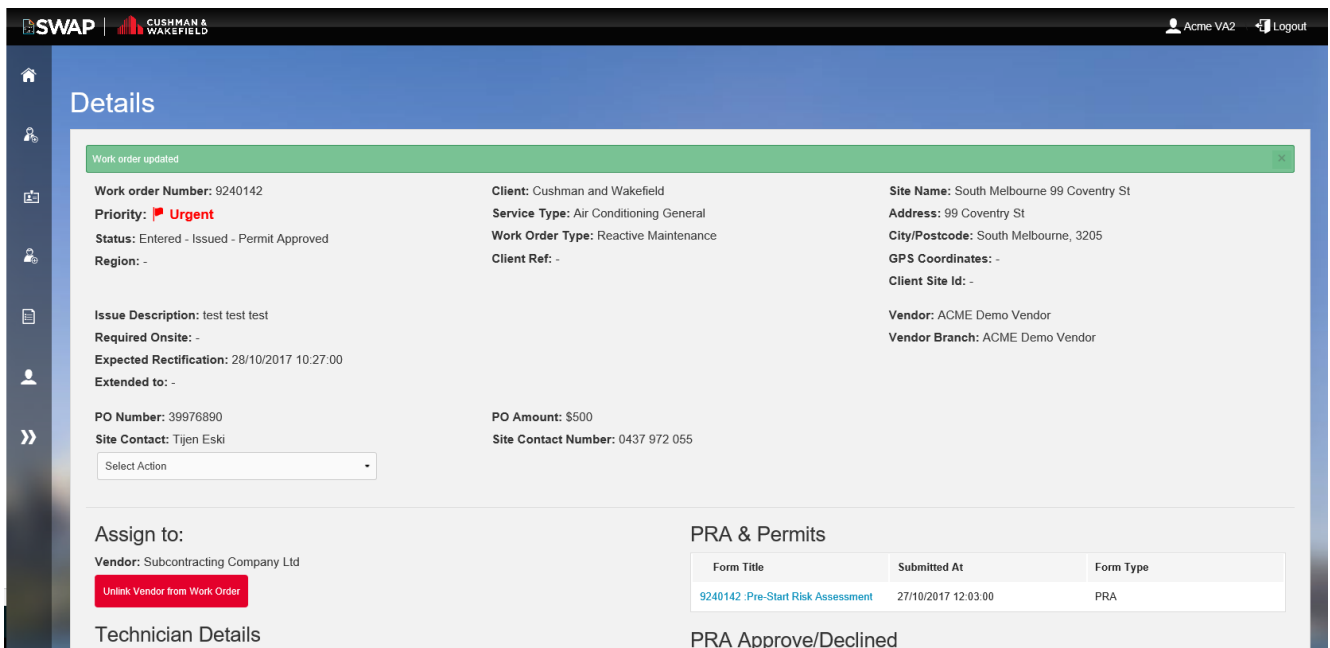
Go to My Work Orders and select the work order number to view the Work Order Details screen

Click on the Select Action dropdown menu and select Assign, then select 'Select Vendor'.

Select the Vendor from the list of registered Subcontractors. **Note:** Greyed out vendors have not completed registration.



Once selected, the Work Order Details page will confirm the vendor has been selected. From here, the subcontractor vendor will receive the work order and assign to their technicians as per [Assign a Work Order to a Technician](#).

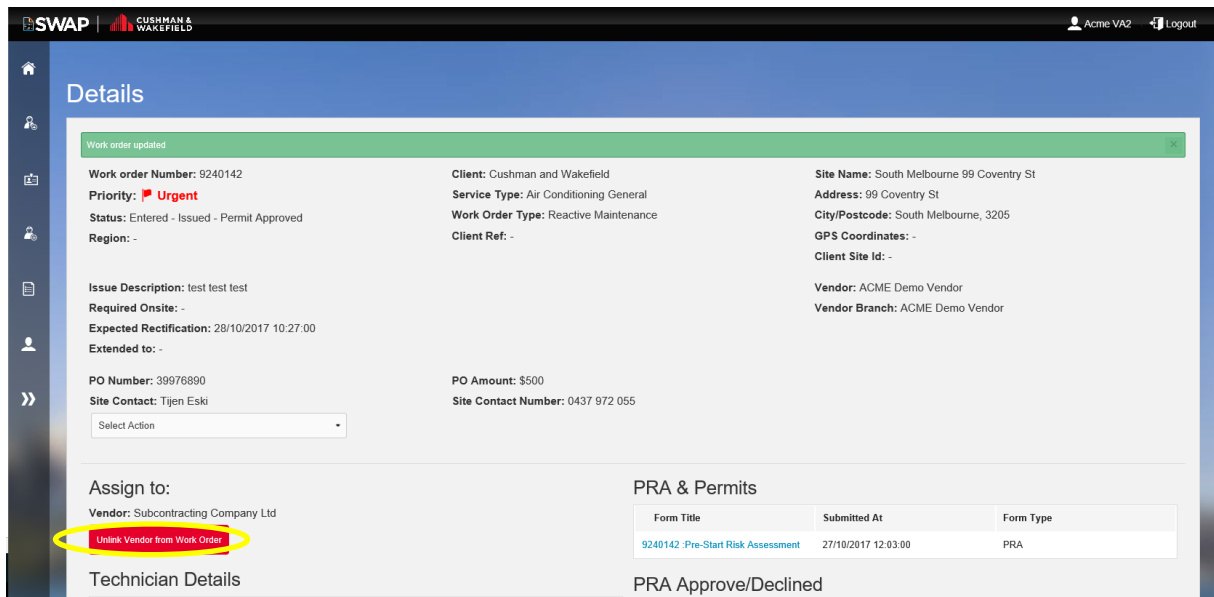


10.2.2. Managing Declined Subcontractor Work Orders

If a subcontractor cannot complete the work, they must notify the original Vendor Administrator. A subcontractor cannot decline a work order via the SWAP Portal and will need to notify the original Vendor Administrator by other means.

10.2.3. Reallocating a Work Order to another Subcontractor

If a Subcontractor cannot complete a work order, you can reassign a Work Order by clicking on the work order to access the Work Order Details page. To unlink the subcontractor, click Unlink Vendor from Work Order.



Work order updated

Work order Number: 9240142
Priority: Urgent
Status: Entered - Issued - Permit Approved
Region: -

Client: Cushman and Wakefield
Service Type: Air Conditioning General
Work Order Type: Reactive Maintenance
Client Ref: -

Site Name: South Melbourne 99 Coventry St
Address: 99 Coventry St
City/Postcode: South Melbourne, 3205
GPS Coordinates: -
Client Site Id: -

Issue Description: test test test
Required Onsite: -
Expected Rectification: 28/10/2017 10:27:00
Extended to: -

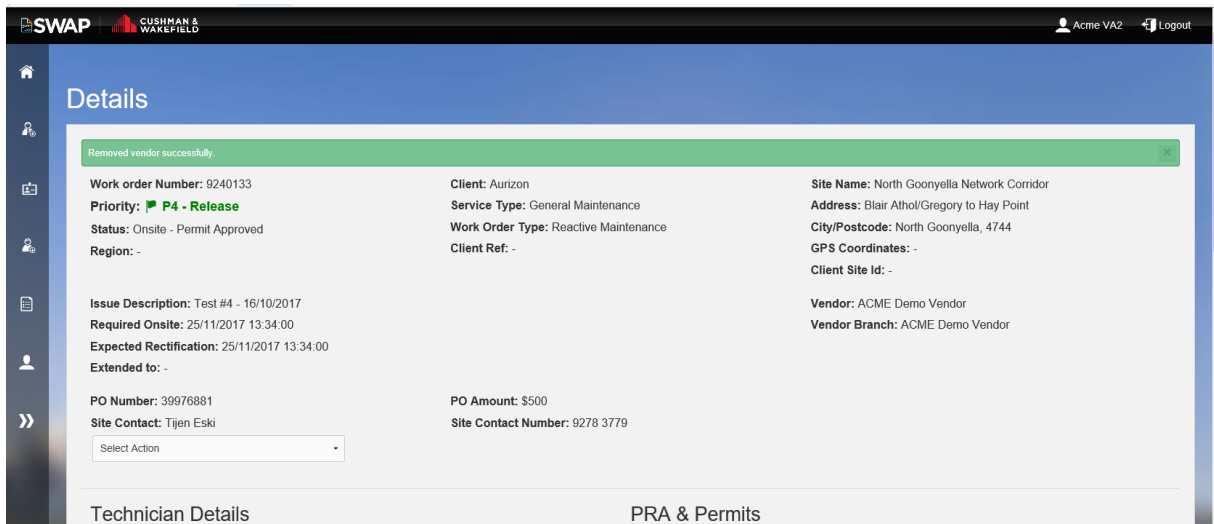
PO Number: 39976890
PO Amount: \$500

Site Contact: Tijen Eski
Site Contact Number: 0437 972 055

Assign to:
Vendor: Subcontracting Company Ltd
Unlink Vendor from Work Order

Form Title	Submitted At	Form Type
9240142: Pre-Start Risk Assessment	27/10/2017 12:03:00	PRA

Technician Details | **PRA Approve/Declined**



Removed vendor successfully

Work order Number: 9240133
Priority: P4 - Release
Status: Onsite - Permit Approved
Region: -

Client: Aurizon
Service Type: General Maintenance
Work Order Type: Reactive Maintenance
Client Ref: -

Site Name: North Goonyella Network Corridor
Address: Blair Athol/Gregory to Hay Point
City/Postcode: North Goonyella, 4744
GPS Coordinates: -
Client Site Id: -

Issue Description: Test #4 - 16/10/2017
Required Onsite: 25/11/2017 13:34:00
Expected Rectification: 25/11/2017 13:34:00
Extended to: -

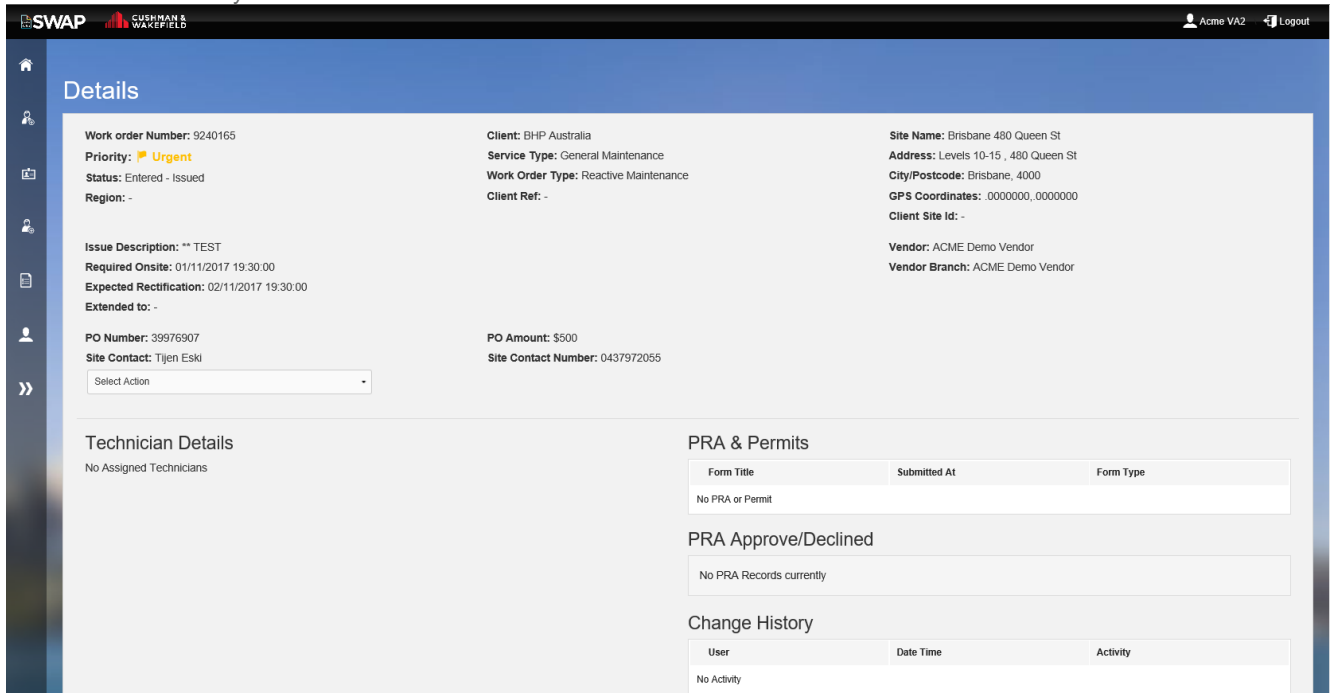
PO Number: 39976881
PO Amount: \$500

Site Contact: Tijen Eski
Site Contact Number: 9278 3779

Technician Details | **PRA & Permits**

10.3. Work Order History

The work order history can be viewed in the detailed view of the work order. Click on the work order number.



The screenshot shows the 'Details' view of a work order in the SWAP system. The page is divided into several sections:

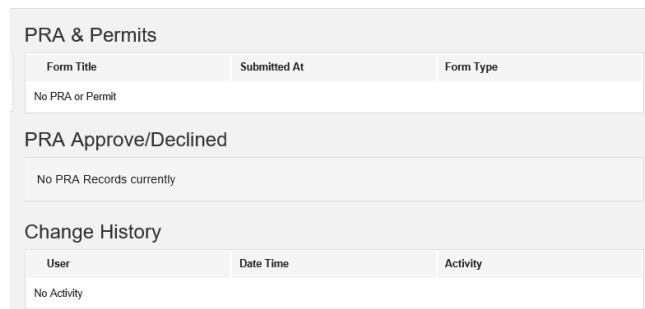
- Work Order Information:**
 - Work order Number: 9240165
 - Priority: Urgent
 - Status: Entered - Issued
 - Region: -
 - Issue Description: ** TEST
 - Required Onsite: 01/11/2017 19:30:00
 - Expected Rectification: 02/11/2017 19:30:00
 - Extended to: -
 - PO Number: 39976907
 - Site Contact: Tljen Eski
 - Select Action dropdown
- Client Information:**
 - Client: BHP Australia
 - Service Type: General Maintenance
 - Work Order Type: Reactive Maintenance
 - Client Ref: -
- Site Information:**
 - Site Name: Brisbane 480 Queen St
 - Address: Levels 10-15 , 480 Queen St
 - City/Postcode: Brisbane, 4000
 - GPS Coordinates: 0000000, 0000000
 - Client Site Id: -
 - Vendor: ACME Demo Vendor
 - Vendor Branch: ACME Demo Vendor
- PO Amount:** \$500
- Site Contact Number:** 0437972055
- Technician Details:** No Assigned Technicians
- PRA & Permits:**

Form Title	Submitted At	Form Type
No PRA or Permit		
- PRA Approve/Declined:**

No PRA Records currently
- Change History:**

User	Date Time	Activity
No Activity		

On the bottom right you can track its history including pre-start risk assessment and Permit submission.



This block provides a detailed view of the bottom right section of the work order details page:

- PRA & Permits:** A table with columns 'Form Title', 'Submitted At', and 'Form Type'. The content is 'No PRA or Permit'.
- PRA Approve/Declined:** A text box containing 'No PRA Records currently'.
- Change History:** A table with columns 'User', 'Date Time', and 'Activity'. The content is 'No Activity'.

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

PRA & Permits

Form Title	Submitted At	Form Type
7648538 :Pre-Start Risk Assessment	01/08/2017 14:32:00	PRA
7648538 :Pre-Start Risk Assessment	01/08/2017 14:33:00	PRA
7648538 :Pre-Start Risk Assessment	01/08/2017 14:34:00	PRA
7648538 :Pre-Start Risk Assessment	01/08/2017 02:53:22	PRA
7648538 :Pre-Start Risk Assessment	01/08/2017 02:54:36	PRA
7648538 :Hot Work Permit	01/08/2017 02:55:25	PERMIT
7648538 :Authorisation B - Permit	01/08/2017 02:56:00	APPROVE

PRA Approve/Declined

Declined by Kemeny Robert at 15/09/2017 11:09:25

Name: Kemeny Robert
Email: cswaptest+robKFM@gmail.com
Phone: 0411111111
Role: fm
Comment: this is declined as there is not enough information. please redo

Change History

User	Date Time	Activity
ACME Tech1	2017-08-01T14:32:00+10:00	PRA Pending
ACME Tech1	2017-08-01T14:32:00+10:00	PRA Submit
ACME Tech1	2017-08-01T14:33:00+10:00	PRA Submit
ACME Tech1	2017-08-01T14:34:00+10:00	PRA Submit
ACME Tech1	2017-08-01T14:53:22+10:00	PRA Submit
ACME Tech1	2017-08-01T14:54:36+10:00	PRA Submit
ACME Tech1	2017-08-01T14:55:25+10:00	Permit Submit
ACME Tech1	2017-08-01T14:56:00+10:00	Awaiting Permit Approval
ACME Tech1	2017-08-01T14:56:04+10:00	Permit Approved

10.4. Bulk Closing Preventative Maintenance Work Orders

If you have multiple Preventative Maintenance Work Orders that are in status 'Permit Approved' or 'No PRA Required', you can close them in bulk using the 'Bulk Update' option in the 'My Work Orders' tile.

To do this, navigate to the My Work Orders tile and use the filter results button to search for the work orders needing to be closed.

Work Order Number

Location

Location State

Vendor Branch

Site Contact Phone

Service Type

Start Date Created

Start Date Onsite

Start Date Completion

Assignment Status

Priority

Client

Location Address

Work Order Type

Site Contact Name

Description

Status

End Date Created

End Date Onsite

End Date Completion

Assigned To

Region

[filter](#) [clear](#) [close](#)

Once your results are loaded, select the check boxes next to the work orders that need to be closed out and select 'Bulk Update' from the Select Action drop down.

Work Order												
Date Created	WO Number	Client	Location	Location Address	Location State	Wo Type (RM/PM)	Vendor Branch	Site Contact Name	Site Contact Phone Number	Description		
<input checked="" type="checkbox"/>	30/01/2017 00:00:00	7895585	Westpac Banking Corporation	Cheltenham Southland.	Shop 2062, Westfield Shopping Centre, 1239 Nepean Highway	VIC Cheltenham, 3192	Preventative Maintenance				MAINTENANCE - 3 MONTHLY	
<input checked="" type="checkbox"/>	22/12/2016 00:00:00	7751690	Westpac Banking Corporation	Dandenong Dandenong Plaza SC.	Sh 123/4/5 Dandenong Plaza	VIC Dandenong, 3175	Preventative Maintenance				MAINTENANCE - 3 MONTHLY	
<input checked="" type="checkbox"/>	29/09/2017 00:00:00	9192214	Westpac Banking Corporation	Victor Harbour Shop 25A Victor Central S.	Shop 25A Victor Central SC, 77 Torrens Street	SA Victor Harbour, 5211	Preventative Maintenance				MAINTENANCE - 4 MONTHLY	

Upon clicking Submit, you will be presented with the Bulk Update screen and will be required to fill out all relevant fields for each work order that requires closing. You can either fill this out in the portal or you can export the data to a spreadsheet to fill out the details. To download the spreadsheet, select the 'Bulk Upload' button and download the template. Once filled out, save the file and import it back into SWAP using the 'Bulk Upload' button again.

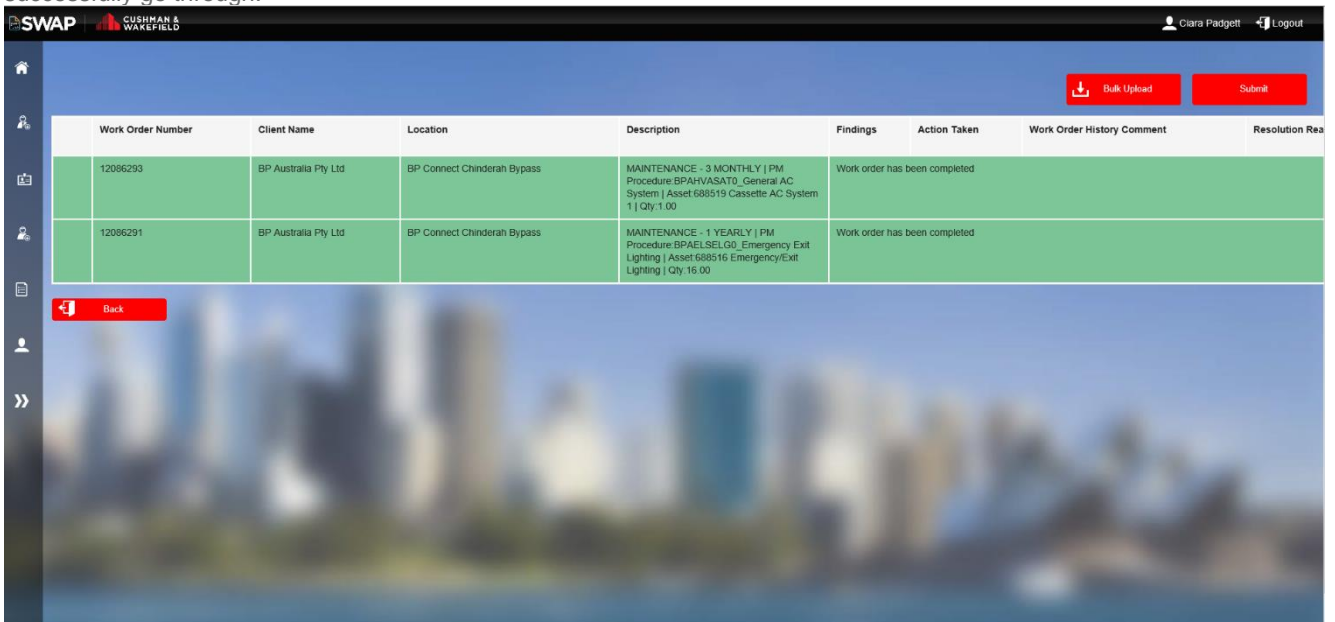
Once all fields are filled out. Select the red Submit button in the top right and you then acknowledge that all work orders are being closed.

I acknowledge that all work orders being closed:

- The work was completed by suitably qualified, competent and inducted worker(s).
- Pre-start risk assessments have been completed for all work orders where required. Risks have been correctly identified and managed and the work was completed in accordance with those safe work practices.
- Any safety or quality related, hazards, incidents or issues have been reported to Cushman & Wakefield and the client.

Confirm

You should then be presented with the below screen if all data was filled out correctly. If any information is filled out incorrectly or a field is missed, you will receive an error advising of what needs to be amended for the bulk close to successfully go through.



Work Order Number	Client Name	Location	Description	Findings	Action Taken	Work Order History Comment	Resolution Reason
12086293	BP Australia Pty Ltd	BP Connect Chinderah Bypass	MAINTENANCE - 3 MONTHLY PM Procedure: BPAHVASAT0_General AC System Asset 688519 Cassette AC System 1 Qty: 1.00	Work order has been completed			
12086291	BP Australia Pty Ltd	BP Connect Chinderah Bypass	MAINTENANCE - 1 YEARLY PM Procedure: BPAELSELG0_Emergency Exit Lighting Asset 688516 Emergency/Exit Lighting Qty: 16.00	Work order has been completed			

Note: If you receive an error message, you will have to correct the discrepancy in order for the work order to be closed off. Some errors you may receive include:

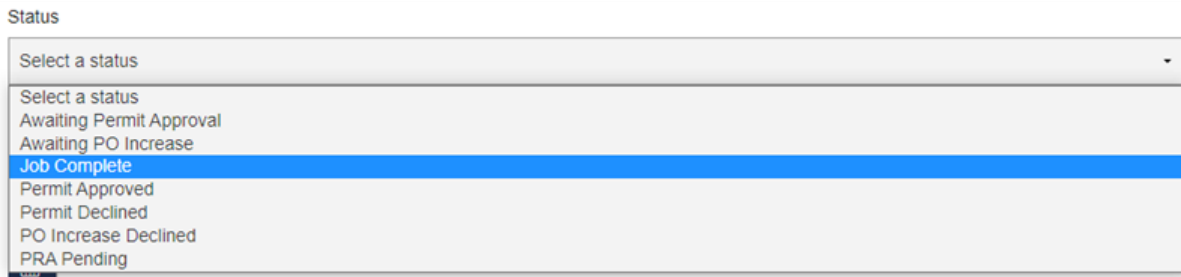
- **Reactive Maintenance Work Order cannot be bulk updated:** This work order can not be closed as it is not a Preventative Maintenance work order.
- **Work Order is already closed:** The work order has been closed by another user.
- **Work order cannot be bulk updated. Please ensure the technician has completed PRAs/Permit steps on the app:** The PRA for this work order is either pending or has not been submitted
- **“xxxxxxx” is an invalid WO number:** This work order number is either not attached to your vendor company or has been entered incorrectly.

11.0 Viewing Completed Work Orders in the Portal

A new feature has been developed for Vendor Administrators to have read-only access to closed work orders via the web portal.

For up to 72 business hours after a work order is closed out by a technician, Vendor Admins will now be able to view all PRA's, Permits, onsite and closure times for a RM and PM work orders. After these 72 business hours is up, the work orders will be removed from the Vendors portal.

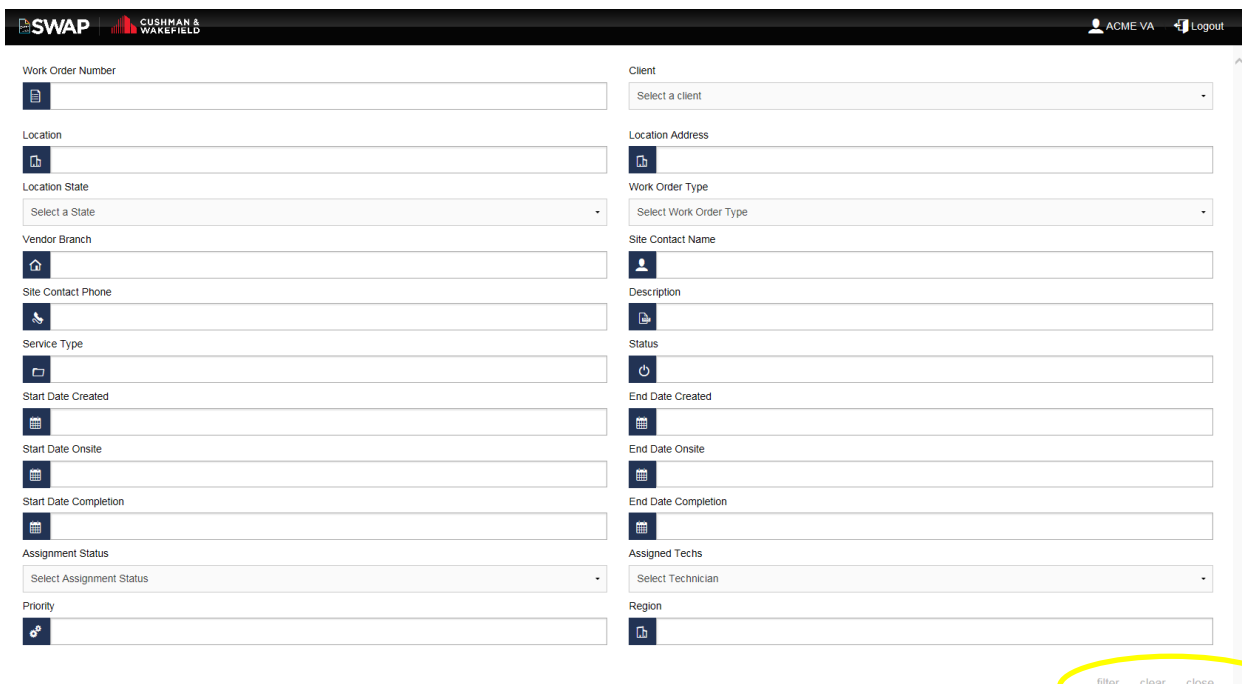
To view recently closed work orders from your Vendor Administrator Portal, simply log in and navigate to the My Work Orders tile. From here, clicking the *Filter Results* option and selecting *Job Complete* from the Status drop down will allow you to filter for all your recently closed work orders.



NOTE: Your recently closed work orders will not show unless you filter for them. This is intended to prevent any confusion around which work orders are opened and require action, from those that have been completed

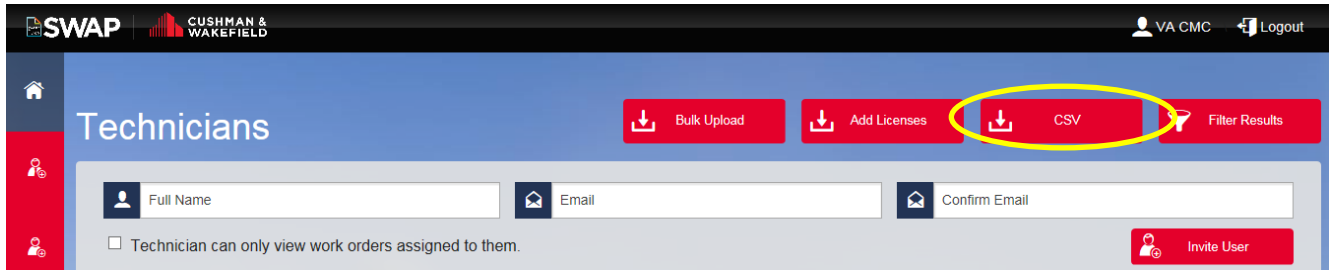
12.0 Using Filter Search

Filter Results allows you to find work orders. Fill the relevant category and click on Filter in the bottom left hand corner



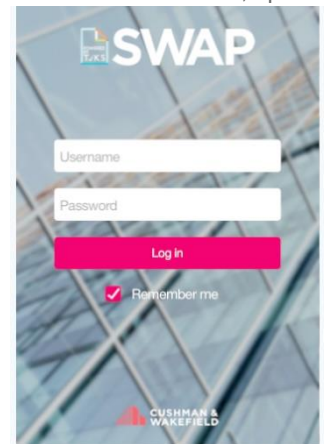
13.0 Export your Technician List

To export your technician list, go to My Technicians and click the CSV button in the top right hand corner. This will export all currently registered technicians to an Excel file. **Note: the list will not show technicians with a status of 'Pending registration'**



14.0 Download the SWAP App

Go to the App Store or Google play and Type in 'Cushman & Wakefield SWAP' into the search bar. Once downloaded, open the app. Enter your Username and Password and select 'Remember me'. If you receive a notification to allow the app to send you push notifications, select yes to enable You can change notification settings at any time in your device settings.

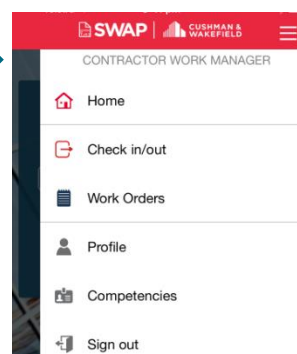
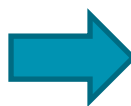


15.0 Work Order Management

The SWAP app home screen. To view further options click on the three lines on the top right hand corner of the screen:



App main screen. Select menu on top right

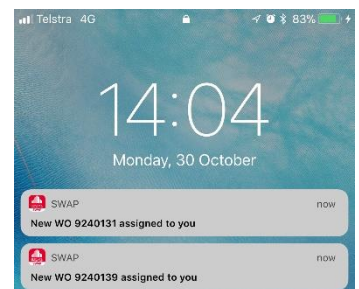


Further Options Menu

15.1. Receiving a Work Order

You will receive a push notification to your device when a new work order is assigned to you.

Please note that push notifications are dependent on Apple and Android providers delivering these notifications to your device. To ensure you receive push notifications, please check you have enabled push notifications on your device.



SWAP New Work Order Notification

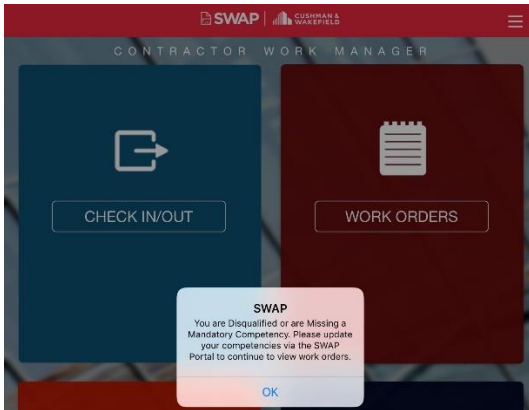
15.2. Accessing and Viewing Work Orders

Once you are logged into the SWAP app, you will see two tiles: Check In/Out and Work Orders

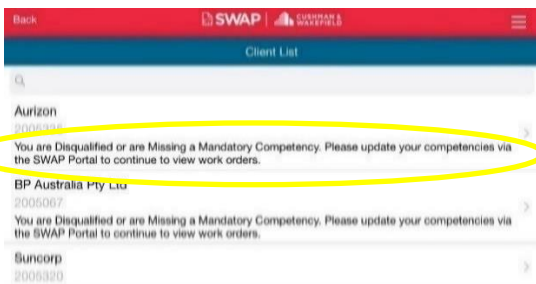
15.2.1. Check In/Out

Check In/Out displays all work orders issued to your employer, whether they are assigned to you or not. This is the tile you will need to access work orders if you are working an on-call or afterhours shift. When selecting Check In/Out, you will be given a list of clients to choose from. Select the client. Then you will be presented with a list of sites with open work orders. Select the relevant site. Next you will see a list of available work orders for that site.

Note: If you are Disqualified or are missing a Mandatory Competency, you will receive either of the below error messages when attempting to use this tile.



You will receive this error message when you have one or more expired competencies

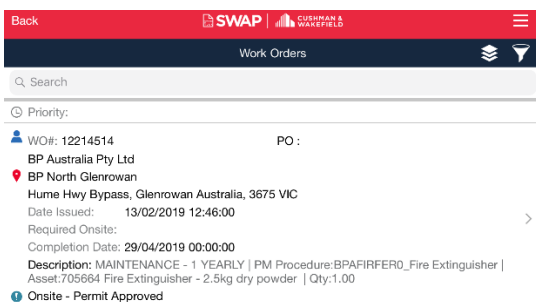


You will receive this error message below a client when you have one or more missing Mandatory Competencies.

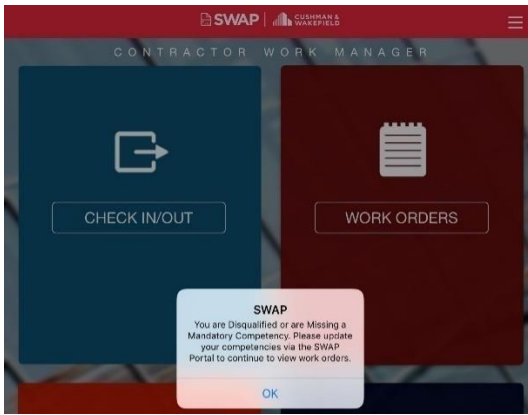
In the above instances, you will be required to [update your competencies](#) via the SWAP Portal.

15.2.2. Work Orders

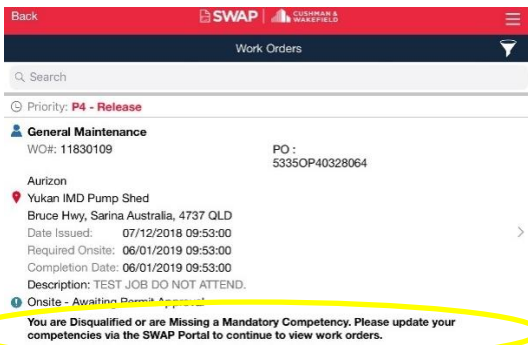
The Work Order tile has a list of Work Orders assigned to you by your Vendor Administrator. Select the work order to begin. If you have no work orders assigned to you this view will be blank.



Note: If you are Disqualified or are missing a Mandatory Competency, you will receive either of the below error messages when attempting to use this tile.




You will receive this error message when you have one or more expired competencies

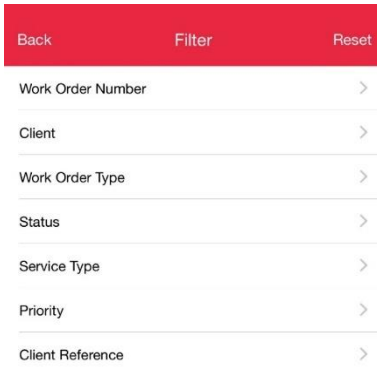


You will receive this error message below a client when you have one or more missing Mandatory Competencies.


In the above instances, you will be required to [update your competencies](#) via the SWAP Portal.

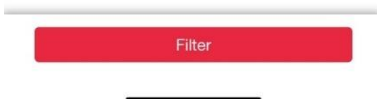
15.2.3. Filtering Work Orders

You can filter the work orders from either the check in/out tile or the work orders tile by clicking the  icon in the top right. Once you have selected this filter option you be presented with this screen



Selecting any of the categories will allow you to narrow down your filter. The filters will only show data based on work orders that are assigned to you in SWAP (i.e. If filtering by work order type when you only have Reactive Maintenance jobs assigned to you, you will not be able to filter by Preventative Maintenance).

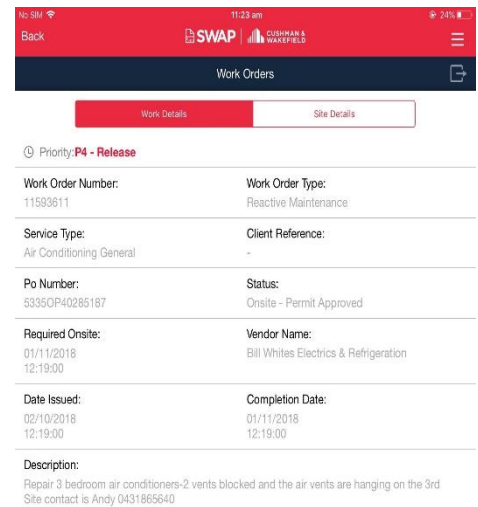
Once you have filled out all fields that you would like to filter for, select the  filter button at the bottom of the page and you will be presented with work orders that match your filters.



15.2.4. Work Details

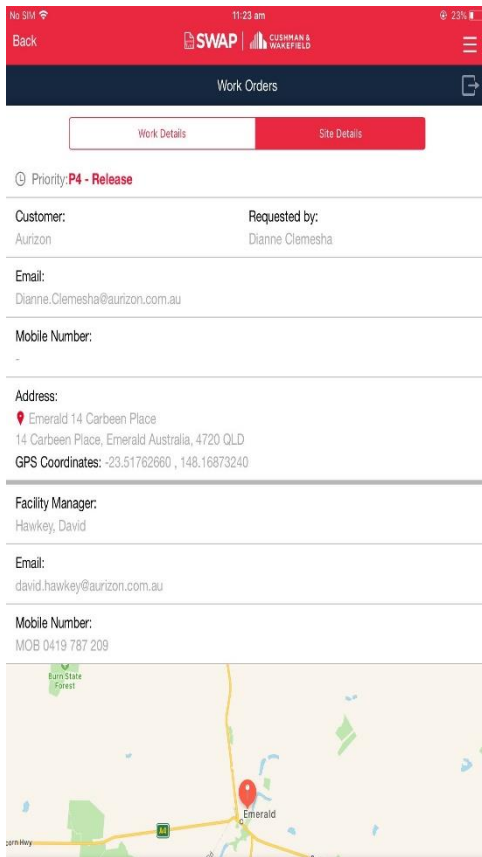
You can now view the work order details including the Priority allocated to the job. The Work Details tab will show you the following information:

- Priority
- Work Order Number
- Work Order Type
- Service Type
- Client Reference
- PO Number
- Status
- Required Onsite
- Vendor Name
- Date issued
- Completion Due
- Description
- Map of the location of the site

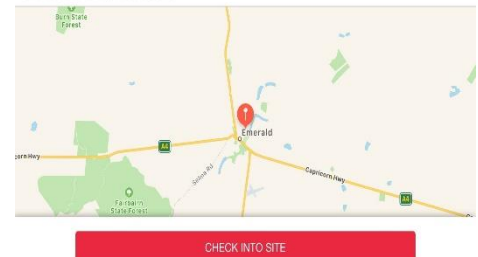


15.2.5. Site Details

When you switch to the Site Details tab, you will see the following information:



- Priority
- Customer: the client you are doing work for
- Requested by: who logged the job with C&W/site contact
- Email: Site contact email address
- Mobile Number: site contact's best contact details
- Address: address of the site
- GPS Coordinates: GPS coordinates of the site (if available)
- Facility Manager: the name of the Facility Manager on site. **This will also be the person who approves pre-start risk assessments and/or permits**
- Email: email address of the Facility Manager
- Mobile Number: mobile number of the facility manager
- Map of the location of the site



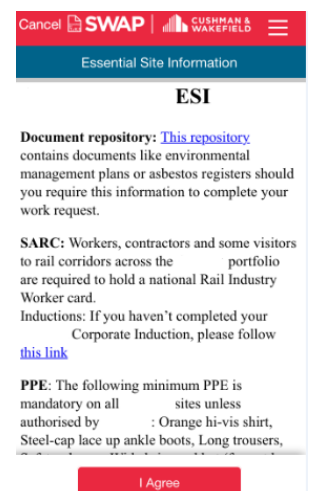
Work Details Screen

Once these details are checked, select check into site. This tells the system you are on site and ready to commence work.

15.2.6. Essential Site Information

Once checked in, the Essential Site Information will be displayed, showing client and site-specific information. Click I Agree to confirm understanding before you begin work.

Once you select I Agree, you will next need to complete the [Pre-Start Risk Assessment and Permit to Work](#)



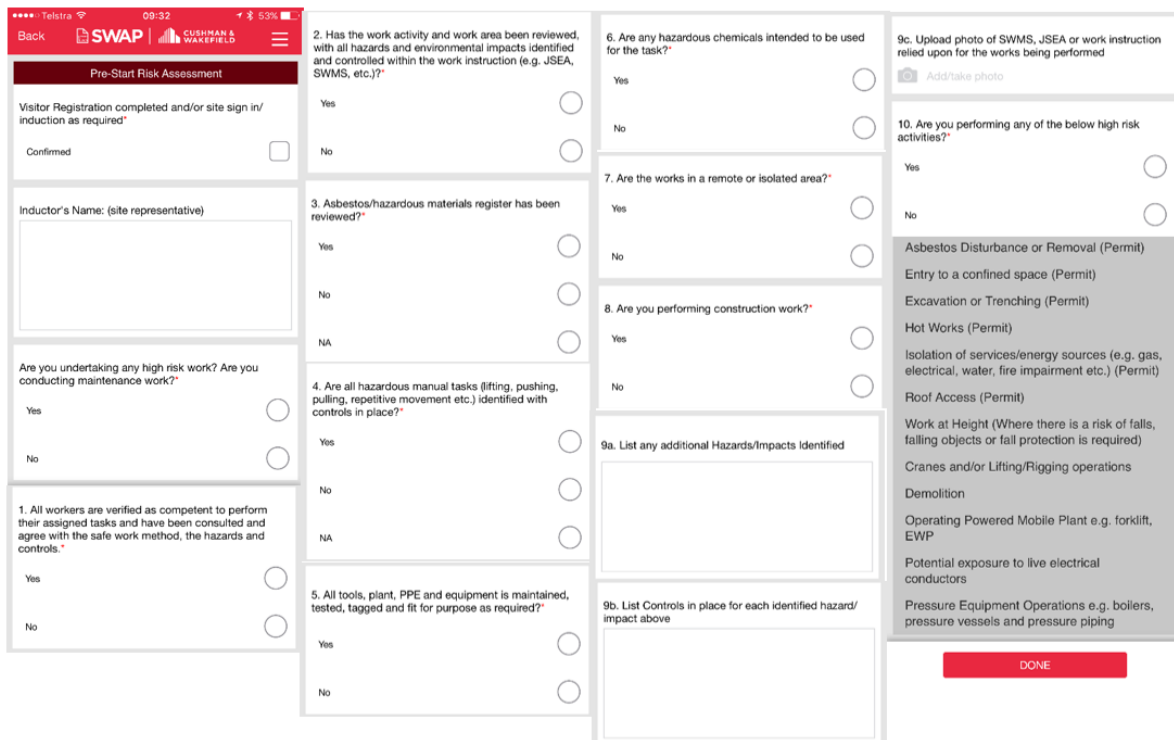
Site Details Screen

16.0 Pre-Start Risk Assessment and Permit to Work

The pre-start risk assessment verifies safe systems of work are in place and identifies whether any permits to work are required. There are four pre-start risk assessments you may encounter, depending on the C&W client you are working for:

	Simple	Basic	Standard	Complex
Work Order Management Technician receives work order from Vendor Administrator	✓	✓	✓	✓
Work Order Management Technician can check in/out of site, complete and close off work order	✓	✓	✓	✓
Essential Site Information (ESI) Technician sights and signs off on client site induction information	✓	✓	✓	✓
Pre-Start Risk Assessment (PRA) Technician completes PRA within SWAP	✗	✓	✓	✓
Permit to Work Process (PTW) If a permit/checklist is required, permit forms completed within SWAP. Forms are submitted electronically to the C&W Facility Manager.	✗	✗	✓	✓
Approval Required Approval required within SWAP for Pre-Start Risk Assessment and permits prior to commencing work	✗	✗	✗	✓

Note: The below example may not appear the same as the one you will be required to complete

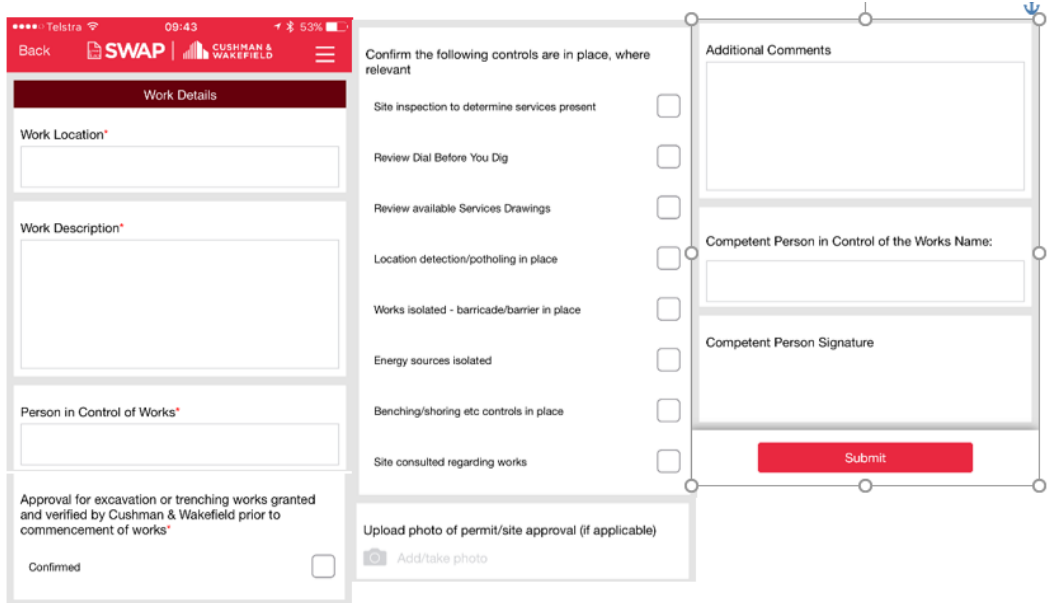


Example Pre-Start Risk Assessment

Note: There is an upload limit of five photos per work order

If you are required to complete a permit, you will be required to fill out the appropriate permit form. For some clients, the permits will be completed outside of SWAP and you will need to upload photo evidence of the completed permit. For other clients, the permits will be completed within the SWAP app.

Note: The below example may not appear the same as the form you will be required to complete.



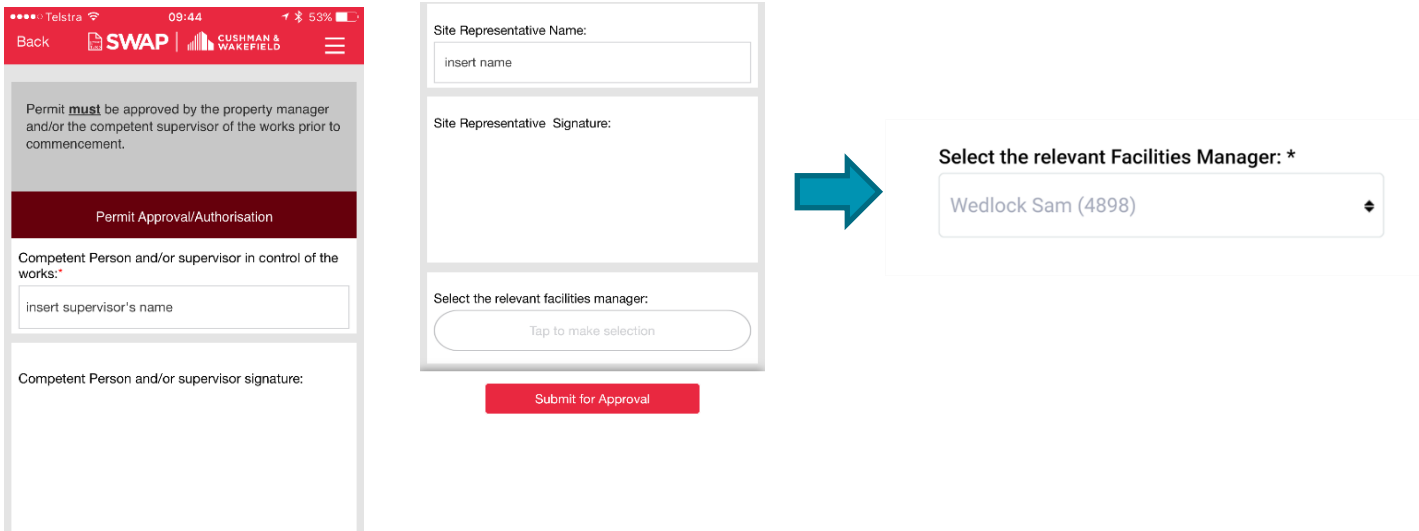
Example Permit to Work in SWAP

16.1. Permit Authorisation Form (Non-Aurizon)

If you are completing a permit within SWAP, you will also need to complete the Permit Authorisation form.

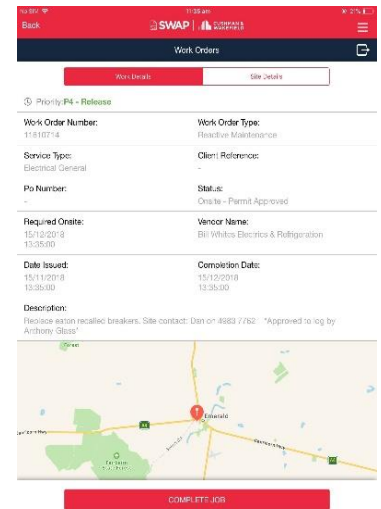
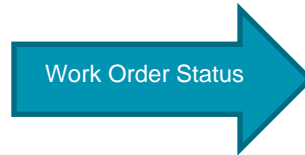
FM selection dropdown has been modified to enhance the way Facility Managers are assigned PRAs. With the new selection dropdown technicians will no longer be required to select the site Facilities Manager from a drop-down list, instead the Facilities Manager will pre-populate, with the option to select a different Facilities Manager if required.

Note: The approver will be the person who is listed as Facility Manager under Site Details. See [Site Details](#)



Once completed, submit the form. You will be taken back to the Work Details section of the app.

At the bottom, you will see the status of the request: whether you can **Complete Work** or **Await Permit Approval**. If you do not have to wait for approval, commence work. See [Awaiting Permit Approval \(Aurizon only\)](#)



16.2. Aurizon Authorization PRA and Permit Form

If contractor is onsite for low risk works and conducts a PRA with an onsite authorized representative present, the technician must obtain that representatives Name and Signature in the mandatory fields. If it is completed correctly the Technician will no longer be required to submit their PRA to an Aurizon Off Site approver.

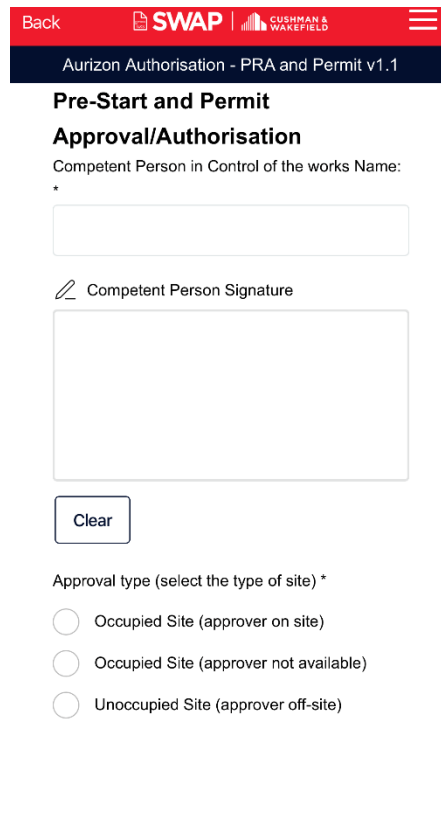
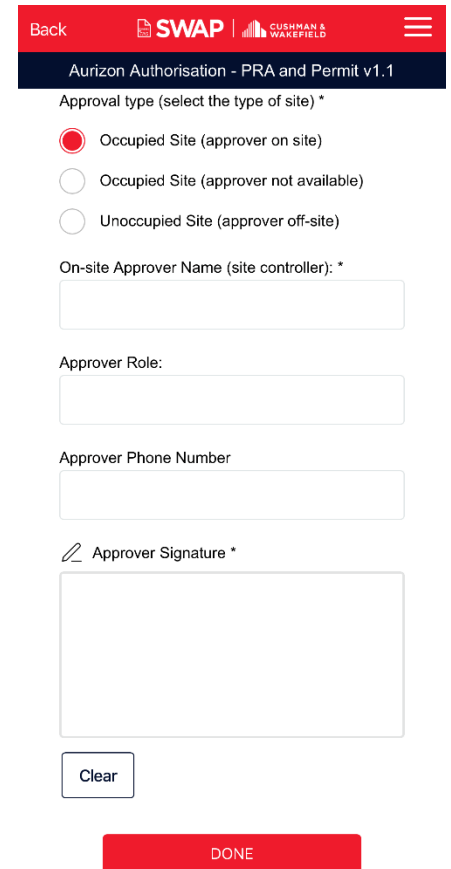
If you are onsite completing low risk works and have an onsite authorized representative present, selecting the **Occupied Site (Approver on Site)** will prompt you to have the approver fill out the following fields: On-site Approver Name, Approver Role, Approver Phone Number and Approver Signature.



Occupied sites: Aurizon Onsite
Representative name and signature must be obtained. The completion of the Pre-Start Risk Assessment will determine if additional approval is required by Aurizon Facilities team to proceed. If works is considered BAU low risk, the Pre-Start Risk Assessment will be automatically approved, and you can commence work.

Unoccupied sites / Aurizon Site Representative not available / includes additional HR Permits: The Pre-Start Risk Assessment must be submitted to the Aurizon Facilities off-site approver.

Contact the Facilities Service Centre on 1300 149 286, option 1 if the Aurizon Off-Site Representative is unknown

Once the approver has filled in this information, tech will be able to submit his low risk PRA without a hold point and commence work.

Note: If you select either Occupied Site (approver not available) or Unoccupied Site (Approver off-site), you will still be required to submit your PRA to an RML for approval with a hold point.

Approval type (select the type of site) *

- Occupied Site (approver on site)
- Occupied Site (approver not available)
- Unoccupied Site (approver off-site)

Off-site approver name: *

DONE

Approval type (select the type of site) *

- Occupied Site (approver on site)
- Occupied Site (approver not available)
- Unoccupied Site (approver off-site)

Off-site approver name: *

DONE

16.2.1. Pre-Start Risk Assessment/Permit Approvals (Aurizon Only)

Once the PRA and Permits is submitted, the work order status will read Awaiting Permit Approval. You will receive a notification that a PRA/permit has been declined or approved via push notification on your device (please enable push notifications on your device in order to receive these notifications.)

16.2.2. Approved PRA/Permit

You will receive a push notification informing you the PRA/Permit has been approved. Open the work order. If the work order status has not updated, swipe down to refresh the screen. Once approved, commence work.



16.2.3. Declined PRA/Permit

Facility Manager who your permit. [Managing](#)

Facility declined See [Declined Permits](#)

16.2.4. Permit Escalation

If you have not received a response from the Facility Manager, escalate the response by contacting the C&W Customer Experience Centre.

16.2.5. Managing Declined Permits

If your permit has been declined, the Facility Manager should contact you to discuss. If not, contact them directly or through the Customer Experience Centre for clarification on requirements for approval.

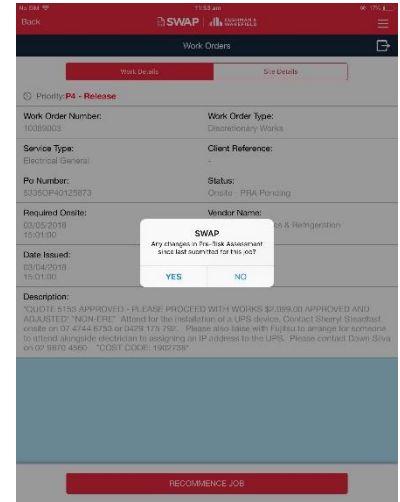
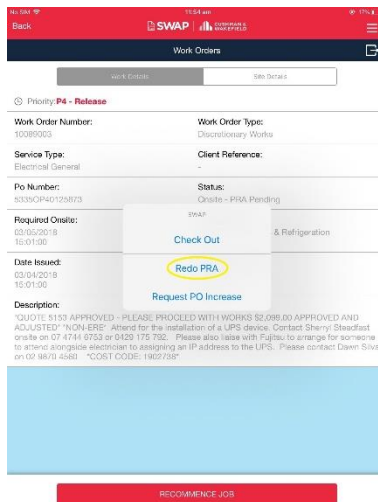
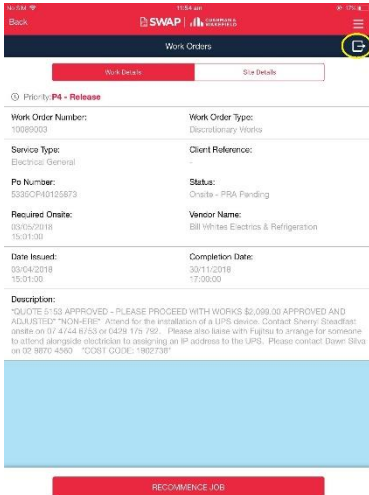
To resubmit, tap on the arrow icon at the top right of the work order screen (below) and select 'Redo pre-start risk assessment'. See [Redoing Pre-Start Risk Assessment or Permit Submission](#)

Permit Declined Message in Work Order List


Permit Declined Status in Work Order Detail

16.3. Resubmitting a PRA or Permit

If you have completed the pre-start risk assessment or permit, but circumstances have changed that impacts on the pre-start risk assessment or permit, you can resubmit the forms again. Go to the work order's work details screen. Click on the box/arrow icon: Select Redo PRA. The app will ask you if there have been any changes in the pre-start risk assessment since last submitted. Select YES and complete the form.



16.4. Submitting a Bulk PRA (PM Only)

If you have multiple Preventative Maintenance work orders for the same site, you can submit a Bulk PRA by clicking the  icon in the top right. This will then take you to the Bulk PRA selection page.

From the Bulk PRA selection Page, you will be able to select the check box beside any work orders that you would like to use the same PRA for.

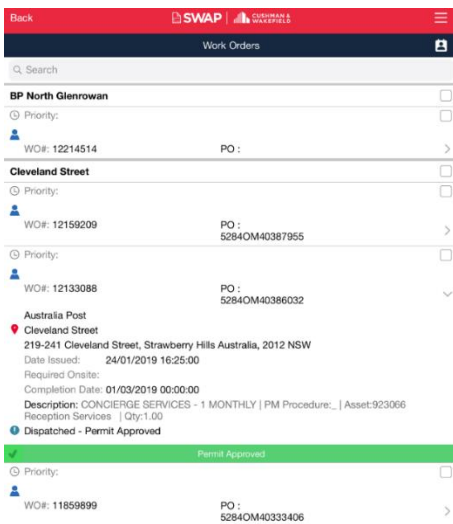
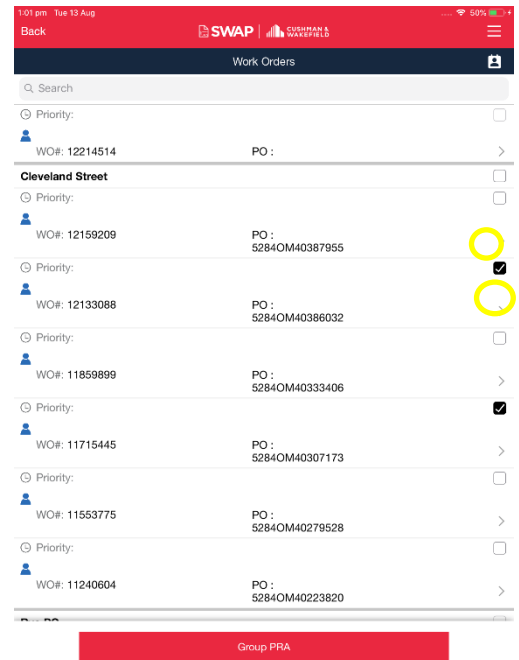
Note: You can only select work orders for the same site to submit a Bulk PRA.

Once you have selected all relevant work orders, select the Group PRA button at the bottom and you will be prompted to [complete a PRA](#).

Selecting the check box beside the Site Name will select all work orders for the site (as circled in adjacent image)

Selecting the check box beside a work order will select only that work order (as per the adjacent image)

Selecting the arrow beside a work order will show more detail on the work order, as per the below.



The PRA that is filled out will then be grouped to any work orders selected from the Group PRA list and technicians will be redirected to a work order list with their selected work orders pushed to the top.

Once the Facilities Manager has reviewed your PRA. You will receive a push notification of either Approval or Decline to your mobile device.

Work orders will not be moved to 'onsite' status until the technician begins to action the work order as they usually would via the SWAP app and any work orders that are not on sited or closed off on the same day that the Group PRA was submitted and approved will return to their original status and require a new PRA to be submitted.

Note: Bulk PRAs are still approved or declined on a work order basis. A Facilities Manager may approve multiple work orders for the Bulk PRA and decline another. If one or more work orders are declined by the FM, you will need to resubmit a PRA for this work order.

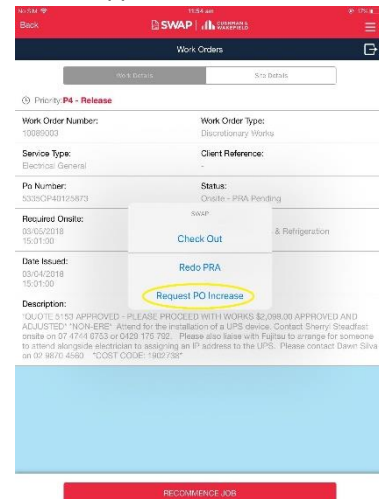
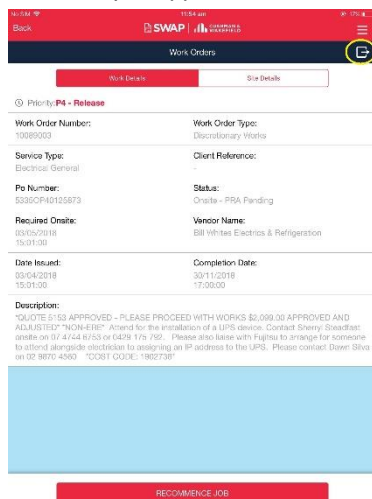
17.0 Recommencing an Open Work Order

If you leave a job and recommence work later, you will be asked whether the Pre-Start Risk Assessment has changed since it was last submitted for the job.

If conditions have changed you will need to complete the pre-start risk assessment and resubmit for approval. You can then recommence the job.

18.0 Work Order/Purchase Order Cost Increase (Aurizon only)

If works will exceed the pre-approved PO amount, you can request an increase via the app. In the work order's work details screen.



Complete the Request Form by typing in the increase amount and the reason for the increase amount. Once complete, select Submit. It will send the request directly to the Facility Manager for the site, who will review the request and approve or decline the request. A push notification will be sent to your device when the Facility Manager has completed their review. During this time, the work order status will read "Awaiting PO Increase"

SWAP User Guide - Vendor Administrator + Technician

Service Line: Global Technology Solutions

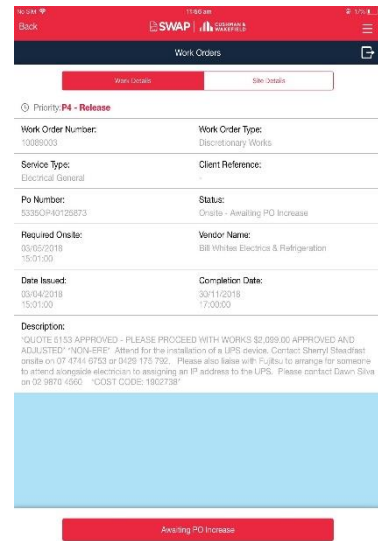
Number: ANZ-GTS-SI-2005

Rev No: 13.4

Publish Date: 12-Jan-21



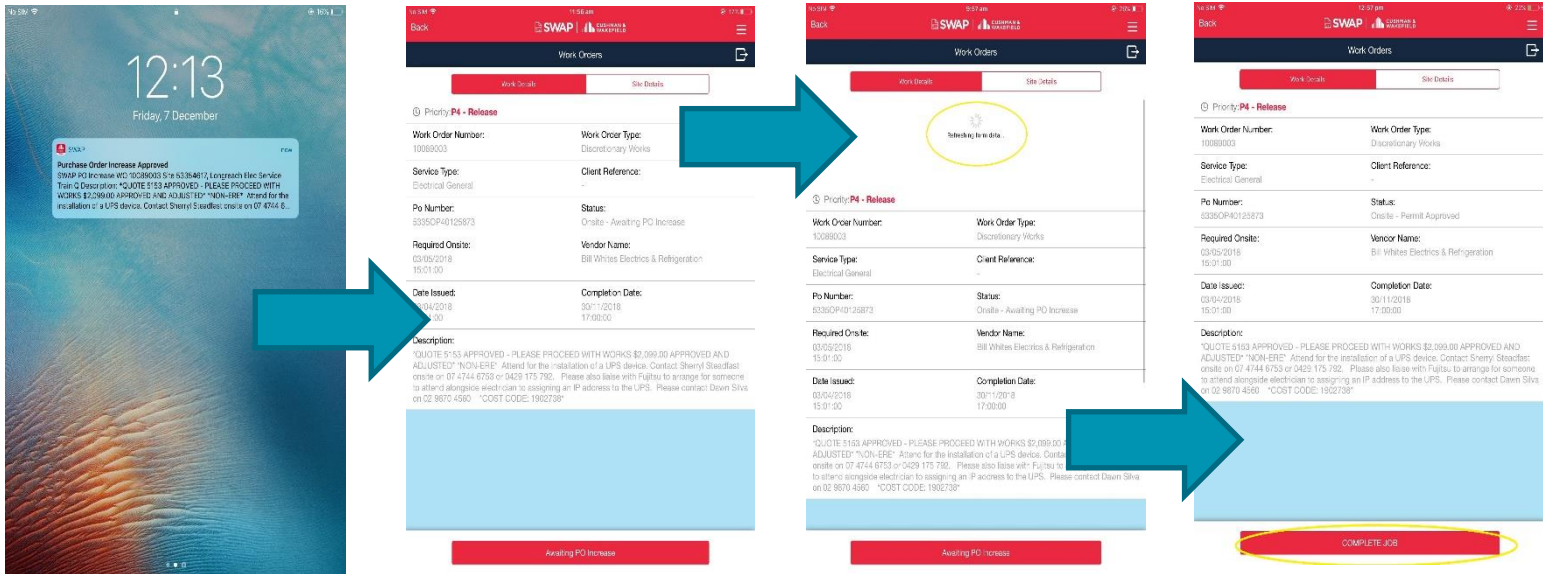
PO Increase Form



Work Order Status "Awaiting PO Increase"

18.1. Purchase Order Increase Approval

Once approved, you will receive a notification to your device. Open the work order. If the Status still reads "Awaiting PO Increase", swipe down to refresh. The status should read "Complete Job."



SWAP Purchase Order Increase Approval – WO 9240161, Site: 53355671 Vendor North Goonyella Network Corrid

Purchase Order 39976906 for Work Order 9240161 has been approved for increase. The details are as follows:

- WO Number: 9240161
- Site: North Goonyella Network Corrid
- WO Description: test test
- Approved By: Kemeny Robert
- Approved Purchase Order Increase amount: \$6000
- Comments: not in a million years

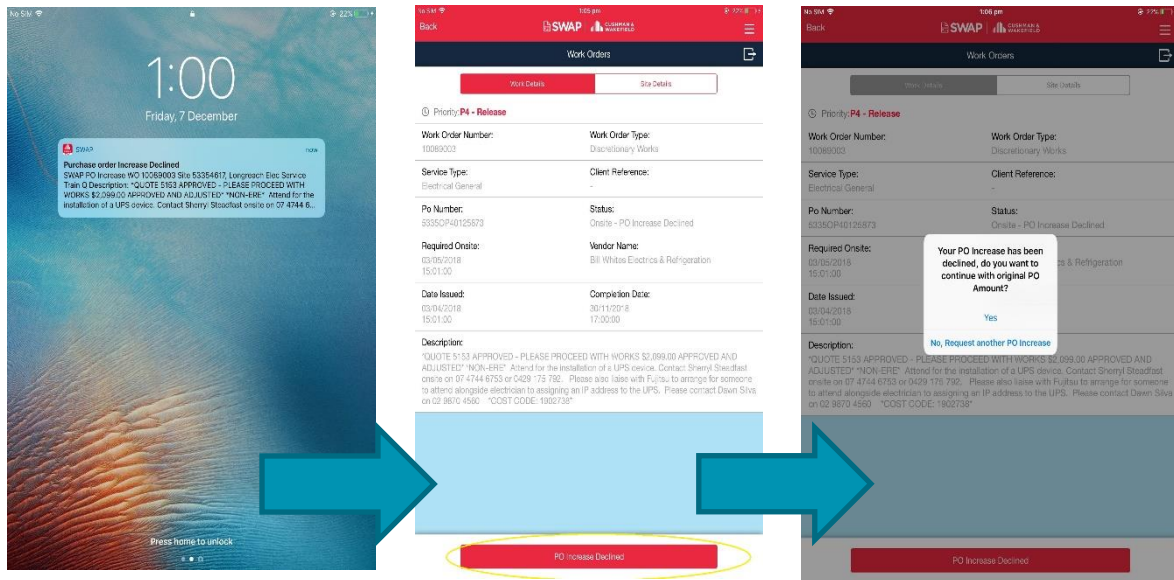
PLEASE DO NOT REPLY TO THIS AS CUSHMAN & WAKEFIELD will not receive your email. This is an unmonitored email address and your email will not reach a valid Cushman & Wakefield system or employee. A failure to redirect your query in line with the instructions above will result in Cushman & Wakefield being unable to action your request.

Thank You

Administrator
Cushman and Wakefield

18.2. Purchase Order Increase Declined

If a PO increase request has been declined, a notification is sent to your device. Contact the Facility Manager or Customer Experience Centre to discuss. To make another request, open the work order, swipe down to refresh and click “PO Increase Declined”.



You will also receive email notification of the declined request:

SWAP Purchase Order Increase Declined – WO 9240159, Site: 53355671 Vendor North Goonyella Network Corrid

Purchase Order 39976905 for Work Order 9240159 has been declined for increase. The details are as follows:

- WO Number: 9240159
- Site: North Goonyella Network Corrid
- WO Description: test test test
- Declined By: Kemeny Robert
- Declined Purchase Order Increase amount: \$6000
- Comments: absolutely not

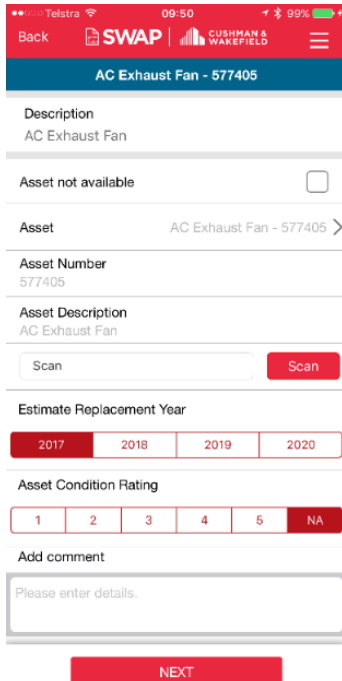
PLEASE DO NOT REPLY TO THIS AS CUSHMAN & WAKEFIELD will not receive your email. This is an unmonitored email address and your email will not reach a valid Cushman & Wakefield system or employee. A failure to redirect your query in line with the instructions above will result in Cushman & Wakefield being unable to action your request.

Thank You

Administrator
Cushman and Wakefield

19.0 Asset Capture

19.1. Asset Capture Form



The screenshot shows a mobile application interface for asset capture. At the top, the status bar shows 'Telstra', '09:50', and '99%' battery. The app header includes 'Back', 'SWAP', and 'CUSHMAN & WAKEFIELD' logos. The main title is 'AC Exhaust Fan - 577405'. Below this, there are several sections: 'Description' with the text 'AC Exhaust Fan'; 'Asset not available' with an unchecked checkbox; 'Asset' with the text 'AC Exhaust Fan - 577405' and a right arrow; 'Asset Number' with the text '577405'; 'Asset Description' with the text 'AC Exhaust Fan'; a 'Scan' input field with a red 'Scan' button; 'Estimate Replacement Year' with buttons for '2017', '2018', '2019', and '2020'; 'Asset Condition Rating' with buttons for '1', '2', '3', '4', '5', and 'NA'; 'Add comment' with a text input field containing the placeholder 'Please enter details.'; and a red 'NEXT' button at the bottom.

For certain types of work orders, you may be prompted to complete an asset capture form

Check box if asset is not available, and you cannot complete the form

Scan QR code or barcode on the asset

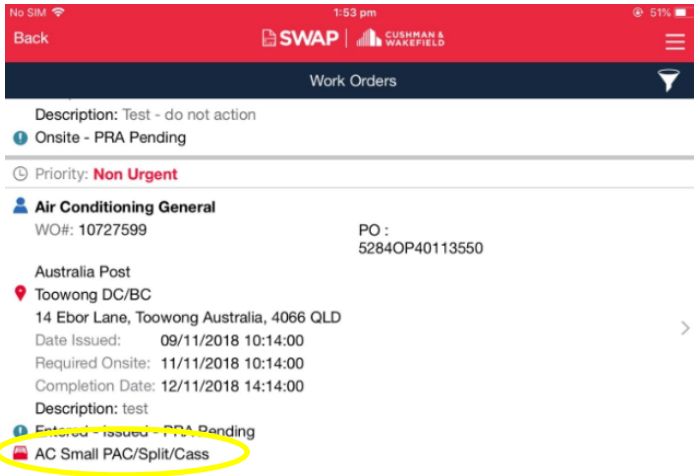
Select the estimated replacement year for the asset

Rate the condition of the asset. 1 = poor; 5 = excellent

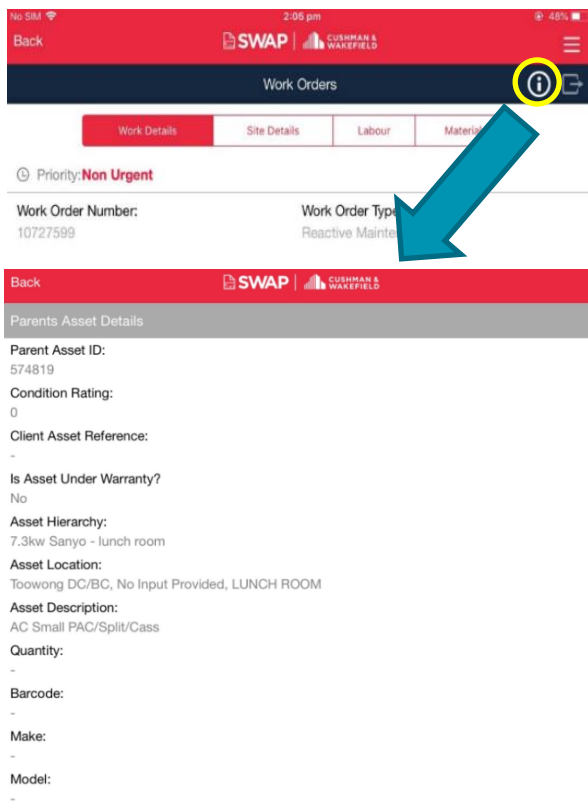
Add any additional comments relating to the asset condition

19.2. Viewing Asset Details

Work orders which have an asset attached to them will have the asset details outlined in the SWAP application.



You will be able to see when an asset is attached to a work order via the Work Order Summary screen.



Once selecting a work order that has an asset attached to it, you will be able to view the full asset details by selecting the information button in the top right of the screen

19.3. Child Asset Filters

Technicians who are required to review assets for a work order are no longer required to go through every single Child Asset in order to complete a work order anymore. Child Assets are now grouped by room, with the ability to filter through the list of child assets by Level and/or Room.

Back	Filter	Reset
	Floor/Level	>
	Room	>

19.4. No Change Required option for Asset Review

Additionally, a 'No Change Required' option has been added for each child asset to simplify the review process for work orders that have a large quantity of child asset.

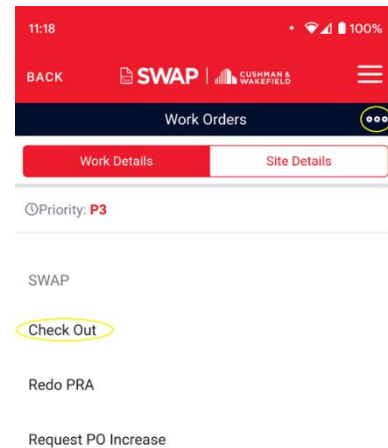
When a 'No Change Required' option is ticked the child asset will automatically be set as reviewed and technician should be able to go ahead and review all relevant assets.

No Change Required

20.0 Check Out Function

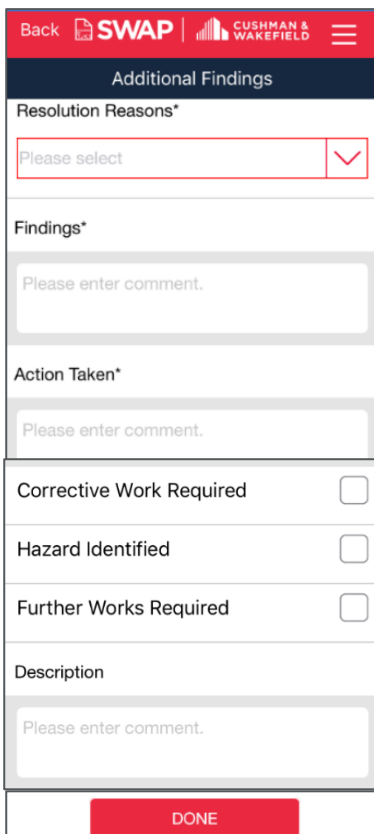
We have also optimised the Check In / Out feature to simplify the process of check onsite times for our Facilities Managers. It is important that technicians are using the Check Out feature when leaving site where work has not been completed.

You can check out of site by tapping the three dots in the top right of the Work Order details page and then selecting the Check Out option. The SWAP app will then request you to check back into site once you return to continue the works on site.



21.0 Completing a Work Order

To complete a work order you must complete the 'Additional Findings' close out screen:



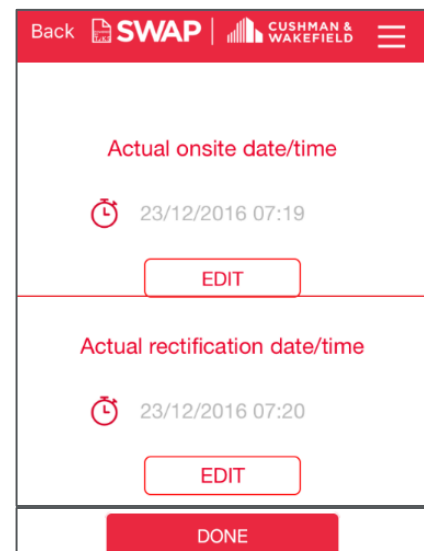
Select the 'Resolution Reasons' from the drop down list

Complete 'Findings' and 'Action Taken' fields

If Corrective Work, Hazards or Future Work has been identified. Select and describe the issue/details of additional works required.

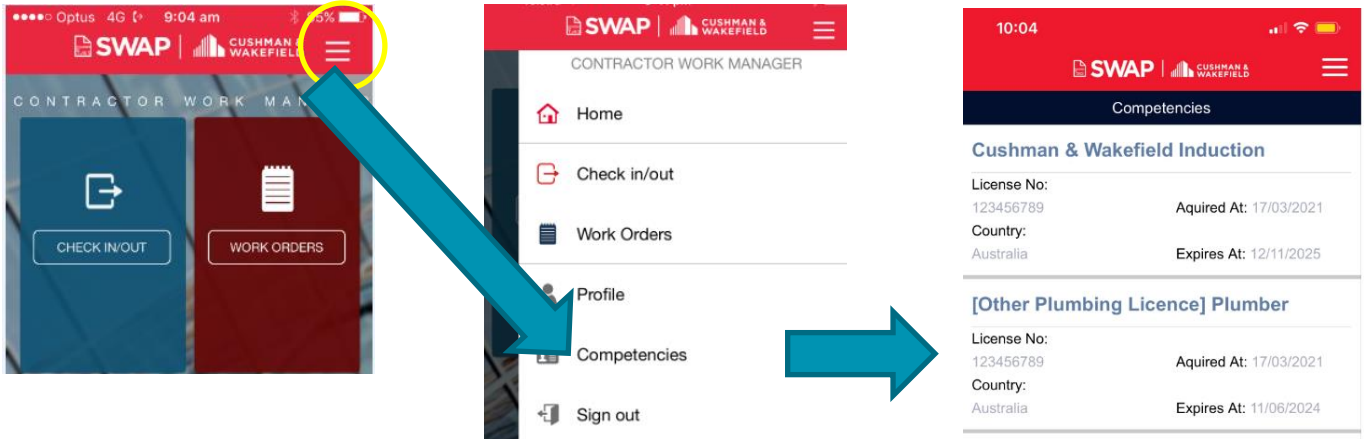
Note: If you check that Corrective Work, Hazard Identified or Further Works Required, please detail what sort of work/hazard has been identified under 'Description'. Do not just say 'yes'.

Complete onsite and completion timestamps



22.0 View Competencies via SWAP App

Sometimes when you are on site working on a job, the client may request to view your competencies. You are able to do this via the SWAP app. On the top right hand of the app, click on the three lines. Select 'Competencies' from the drop down list.



Note that you will not be able to update it via the app, to update you will need to log onto the SWAP Technician Portal on a computer.

23.0 Expiring Competency Notification

Competency email notifications will provide you more details on which one of your active competencies is expiring. This will assist you in identifying what is soon to expire without having to login to the SWAP portal. Below is an example of what the new notifications will look like:



Technician Steve Badham has a competency Cushman & Wakefield Induction that is due to expire:

Competency Type: Cushman & Wakefield Induction
Expiry Date: 2020-11-11

There are 2 ways to Renew or Retire your competencies:

- Technicians can manually update them via the [SWAP portal](#) under the competency section
- Vendor administrators can also update them on behalf of their technicians via the 'View' button or 'Add licences' function on the 'My Technicians' tile.

Renew Competency - this should be used when a competency has expired or is due to expire. Clicking on the Renew Competency button will allow you to enter the new Acquired/Expiry dates as well as update the Licence number if this has changed.

Retire Competency - this should be used where a technician has a competency they no longer require and are not intending to renew. Once a competency is retired it will be visible in the Retired Competency Tab.

Please refer to your user guide for instructions on how to manage your competencies [User Guides](#)

SWAP Support Team

24.0 Support Function

There is a new Support option for Suppliers within both the Web Portal and Mobile Application.

Selecting this option on the **Web Portal** will take you to our Vendor Engagement Portal, where you will find all of our user guides, training dates and more. From here you can also send an email to the application support team for further assistance.

Selecting this option on the **Mobile Application** will load the below page, where a user can send a support ticket to the Application Support team.