



SWAP User Guide – Vendor Administrator

ANZ-GTS-SI-3323

Contents

1.0	Definitions	4
2.0	Access	4
2.1.	Browser requirements	4
2.2.	Help	4
3.0	Background	4
4.0	SWAP Engagement Portal	5
5.0	Registration Process	5
5.1.	Vendor Administrator invited to SWAP	5
6.0	SWAP Vendor Administrator Portal Overview	6
6.1.	Portal Navigation	6
6.2.	Updating your Profile	7
7.0	Invite Additional Vendor Administrators	8
7.1.	Allocating Vendor Administrators to Vendor Branch/es	8
7.1.1.	How Vendor Branches Work	8
7.1.2.	Allocating Vendor Branches to Existing Vendor Administrators	8
7.1.3.	Allocating Vendor Branches to New Vendor Administrators	10
8.0	Invite Technicians and Workers	10
8.1.	Review Competencies	11
8.1.1.	Notification of Updated Competencies	12
8.2.	Technician Only Views Assigned Work Orders Feature	12
8.2.1.	After Hours Work Order Assignment	12
8.3.	How to Invite Technicians for Multiple ABN Vendor Companies	13
8.3.1.	Error when adding Bulk Uploading Existing Technicians	13
8.4.	Adding Technicians to Vendor Branches	13
8.4.1.	Adding Technicians from other Branches to your Branch	14
8.5.	Bulk Invite Technicians and Workers to SWAP	15
8.6.	Approving Technician and Worker Competencies	16
9.0	Invite Subcontractor Admins	17
9.1.	Subcontractor Vendor Admin Dashboard	17
10.0	Manage Work Orders	18
10.1.	In-House Work Order Management (No Subcontracting)	18
10.1.1.	Assign a Work Order to a Technician	18
10.1.2.	Bulk Assigning Work Orders to Technicians	21
10.1.3.	Reassign a Work Order/Remove Technician from Work Order	22
10.1.4.	Add Additional Technicians to an Open Work Order	23
10.1.5.	Decline a Work Order	23
10.2.	Subcontractor Admin Work Order Management	24
10.2.1.	Assigning a Work Order to a Subcontractor Admin	24
10.2.2.	Managing Declined Subcontractor Work Orders	25
10.2.3.	Reallocating a Work Order to another Subcontractor	25
10.3.	Work Order History	26
10.4.	Bulk Closing Preventative Maintenance Work Orders	27
11.0	Viewing Completed Work Orders in the portal	29

SWAP User Guide - Vendor Administrator

Service Line: Global Technology Solutions

Number: ANZ-GTS-SI-3323

Rev No: 3.4

Publish Date: 13-Jan-21



12.0	Using Filter Search	29
13.0	Export your Technician List	30
14.0	Support Function	30

1.0 Definitions

Term	Definition
CXC	Customer Experience Centre
ESI	Essential Site Information
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 Contractor 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 Portal, go to <http://www.cushwakeswap.com> and use your login details. The SWAP Vendor Administration Portal is where you can:

- Receive Cushman & Wakefield work orders
- Invite technicians to register to SWAP
- Upload technician qualifications
- Manage and assign work orders to technicians, workers, and subcontractors

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?

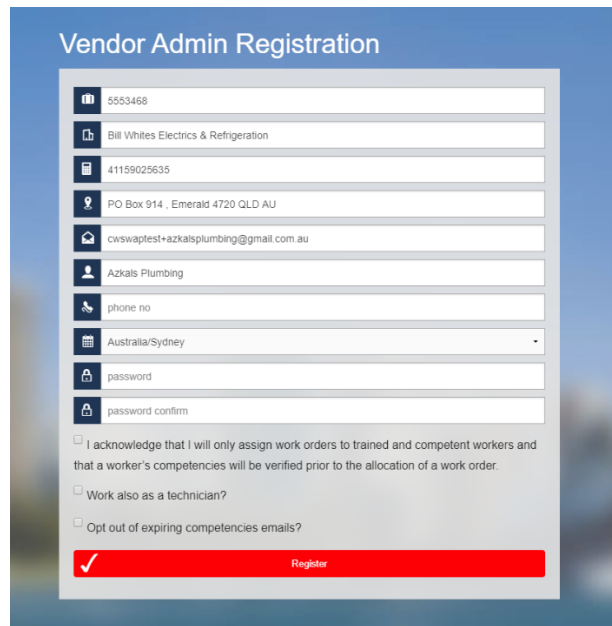
When a work order is raised by the Cushman & Wakefield Operations Centre (call centre), it is sent directly to the contractor company's SWAP Contractor Portal, who will then allocate the job to a qualified technician or worker. The job is accepted through the SWAP app by the technician or worker, who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



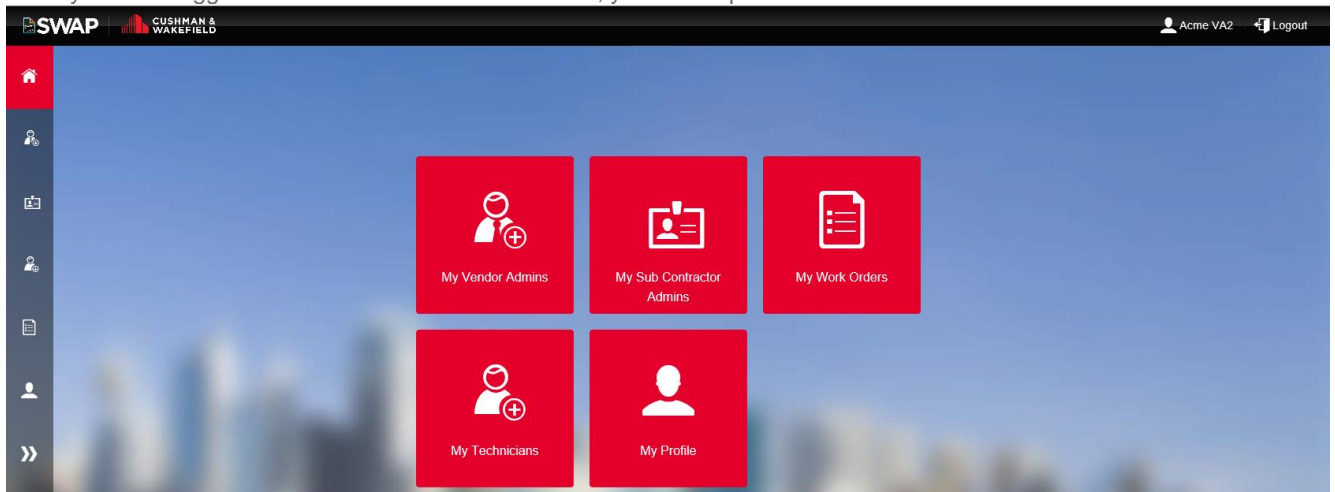
The screenshot shows a registration form titled "Vendor Admin Registration". It contains several input fields: a numeric field with "5553468", a text field with "Bill Whites Electrics & Refrigeration", a numeric field with "41159025635", a text field with "PO Box 914, Emerald 4720 QLD AU", an email field with "cswapfest+azkalsplumbing@gmail.com.au", a text field with "Azkals Plumbing", a text field with "phone no", a dropdown menu with "Australia/Sydney", a password field with "password", and a password confirmation field with "password confirm". Below the fields are three checkboxes: "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?", and "Opt out of expiring competencies emails?". A red "Register" button is at the bottom.

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.

6.0 SWAP Vendor Administrator Portal Overview

6.1. Portal Navigation

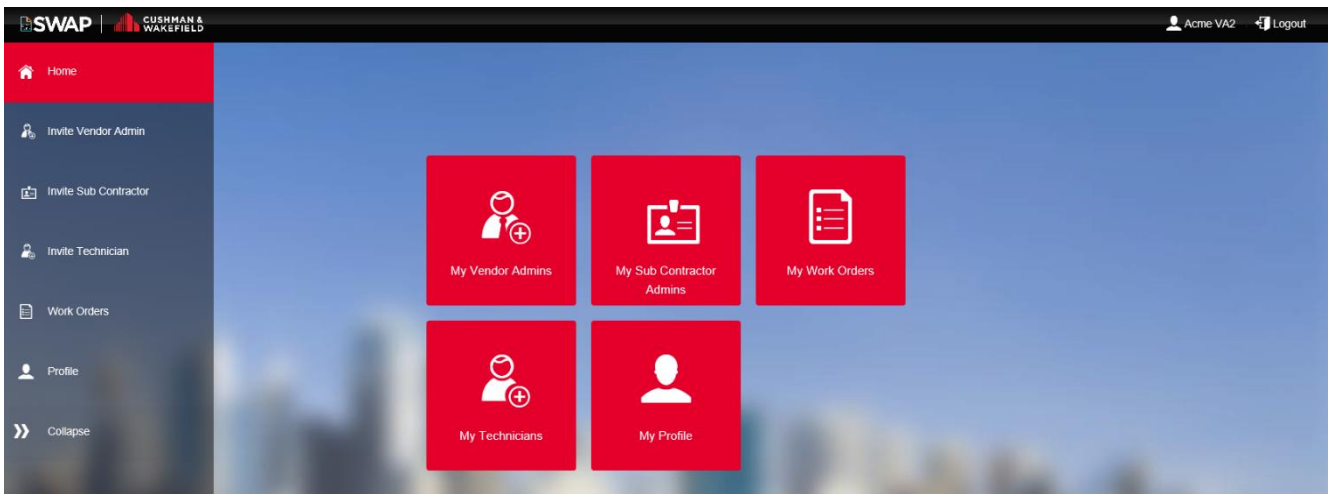
Once you have logged into the SWAP Contractor Portal, you will be presented with the main screen.



You will see the following tiles:

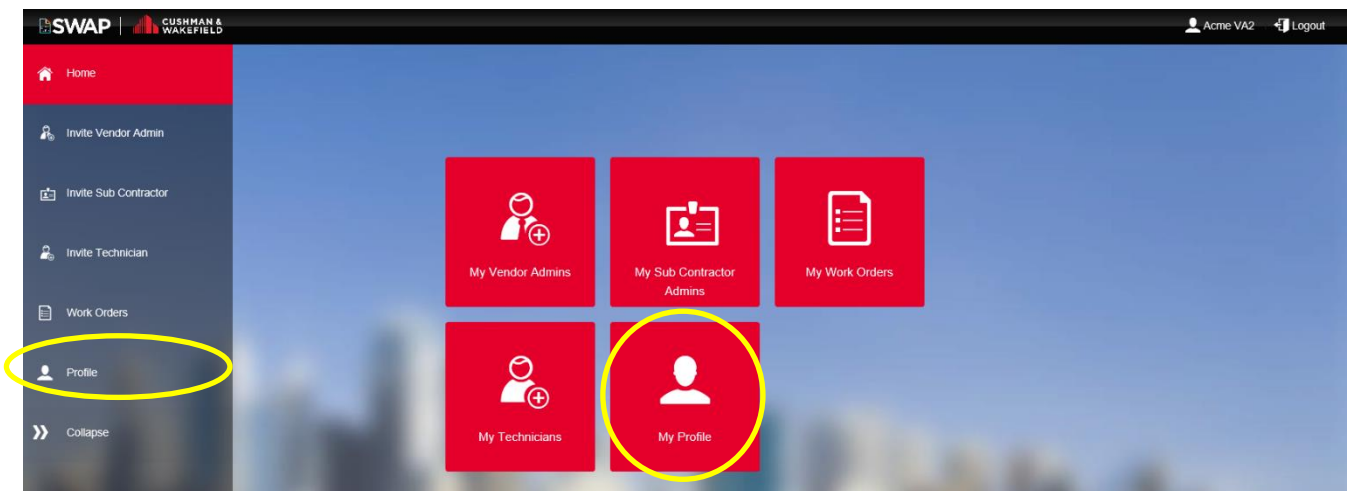
- **My Vendor Admins:** Where you can invite additional administrators
- **My Sub Contractor Admins:** Where you can invite subcontractor vendor administrators
- **My Technicians:** Where you can invite technicians, workers and subcontractors
- **My Work Orders:** where you can view, accept and assign 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:



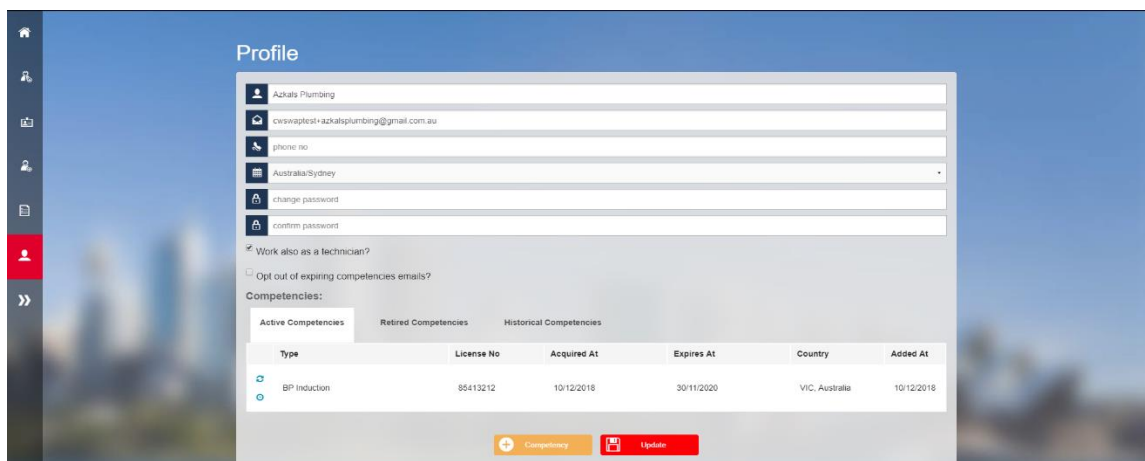
6.2. Updating your Profile

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



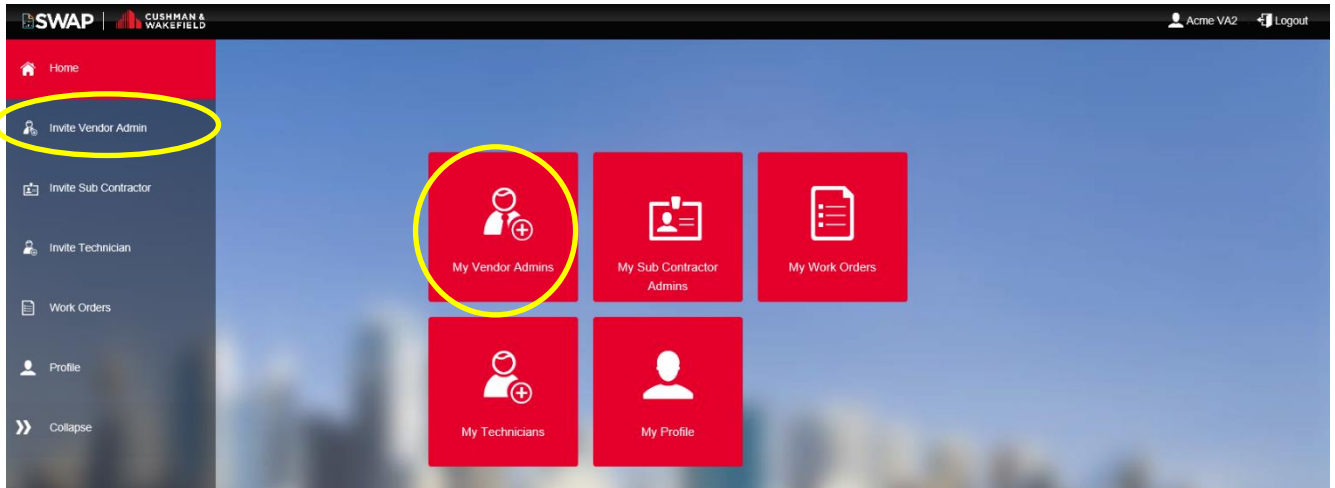
You can update:

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

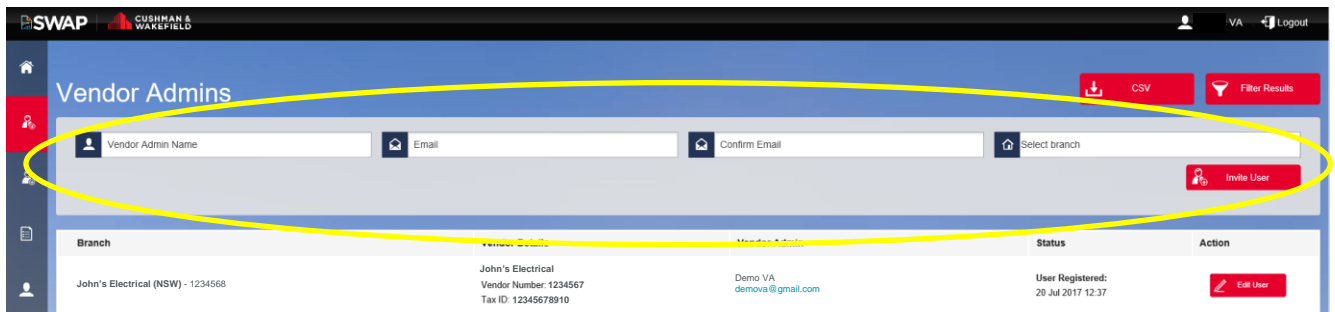


7.0 Invite Additional Vendor Administrators

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

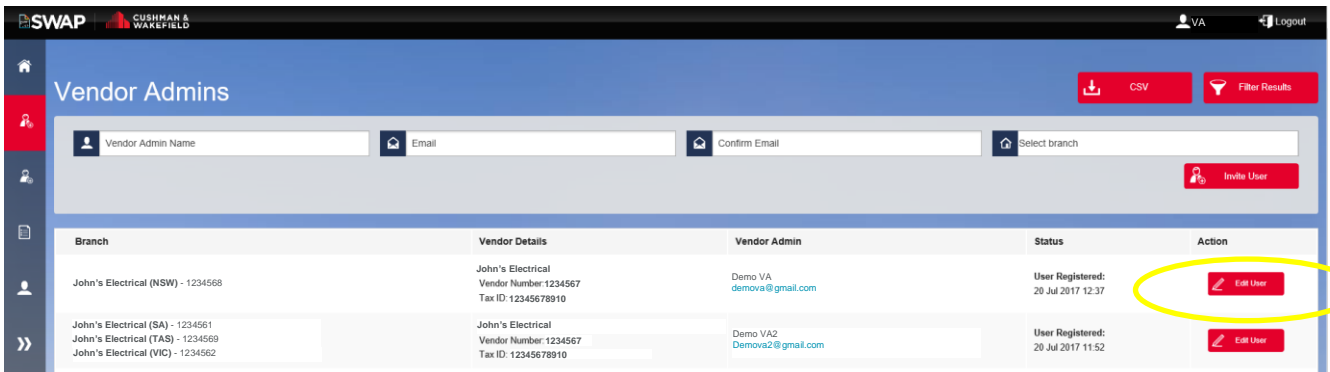
In the example, Company XYZ has three branches – Branch A, Branch B and Branch C: Y = can view work order; N = cannot view work order

	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

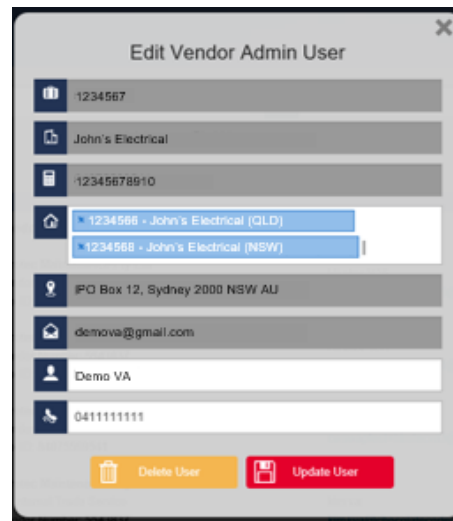
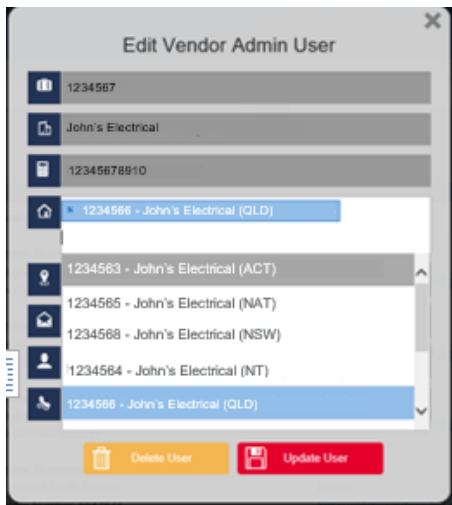
To allocate Branches to a Vendor Administrator, go to My Vendor Admins and select Edit User next to the Vendor's name.



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



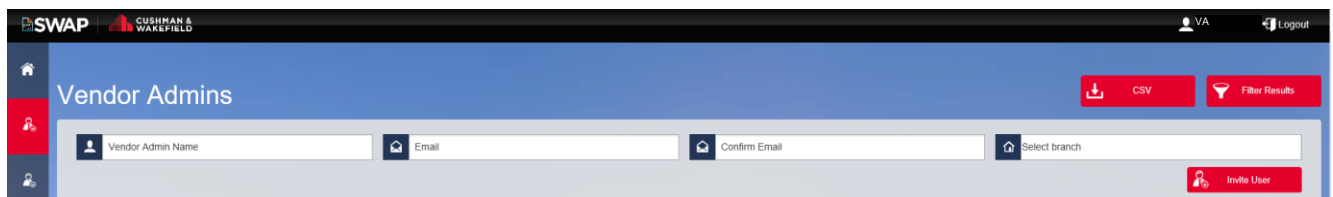
To select multiple, click in white area of the Select Branch field again and choose another branch.



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

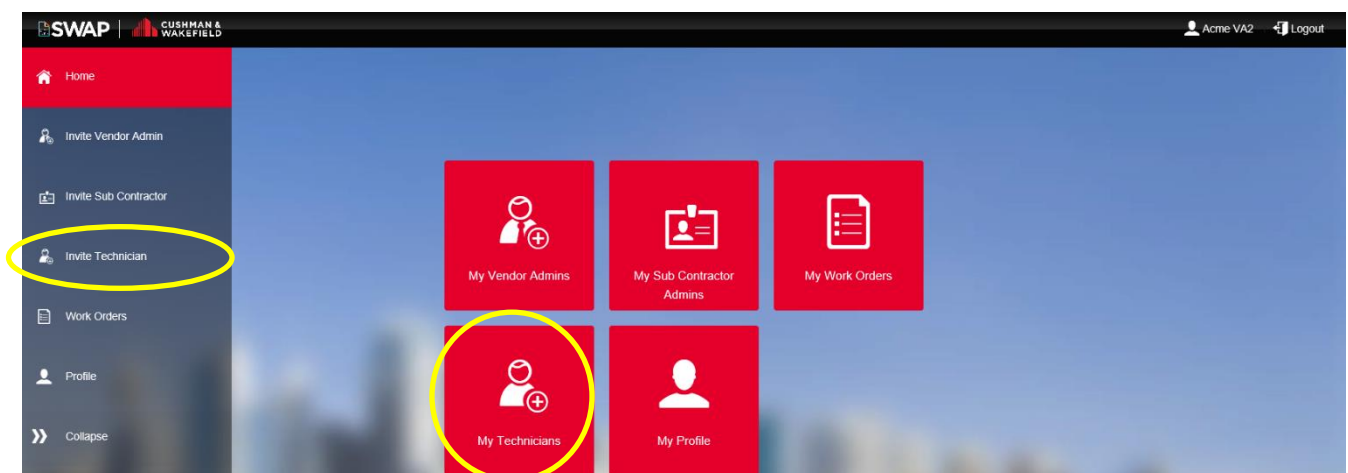
Note: These instructions are for adding branches to Vendor Administrators who are being invited to SWAP for the first time



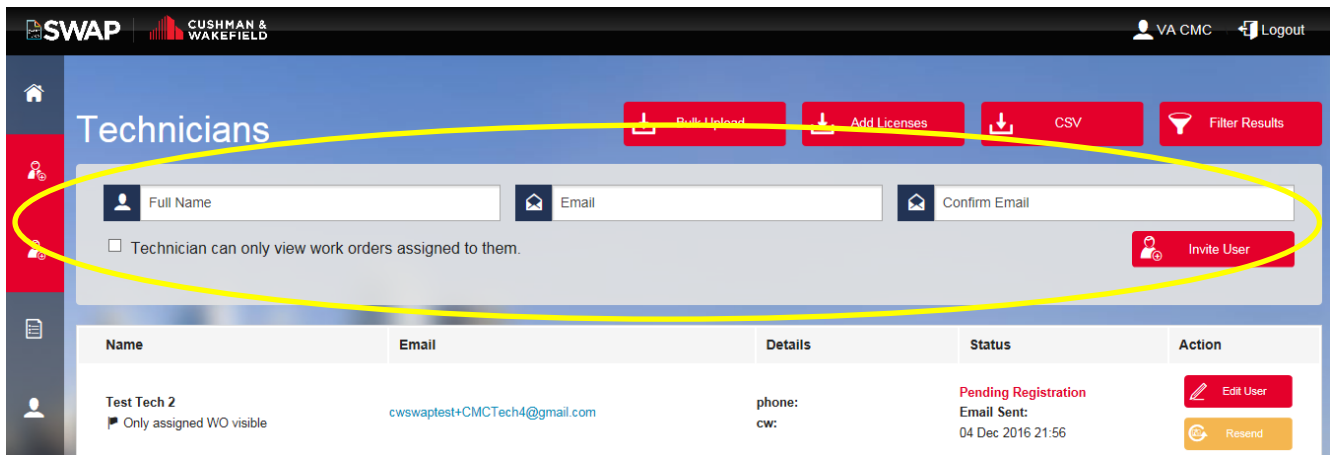
Enter the Vendor Admin's full name, email address, and confirm email address. To allocate a branch, click on Select branch and choose from the dropdown list. To add multiple branches, click in the field again to bring up and dropdown menu to select another branch.

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.



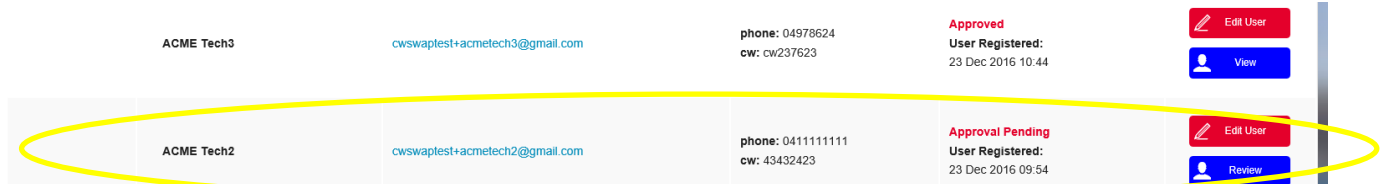
On the right of the screen of each technician at any time you can:

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

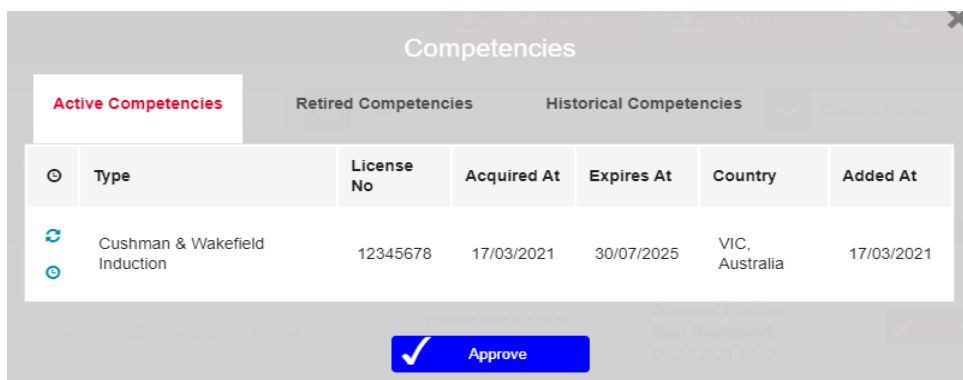
Once invited, the technician will appear in the list below, with a status of 'Pending Registration'. Once the technician has completed registration, it will change to 'Approval Pending'. When the VA has completed Review, it will change to 'Approved'.

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.



Review the competencies and approve if correct.



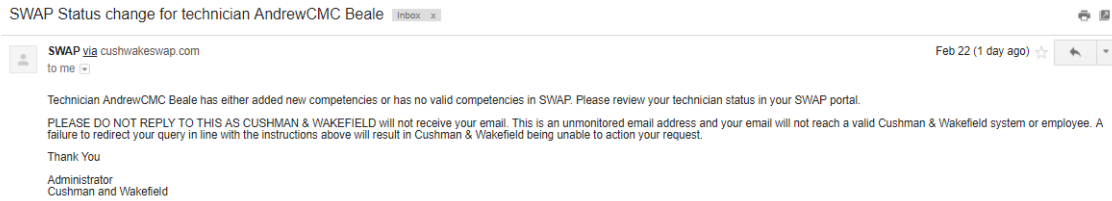
Once approved the status will read 'Approved'.



When a technician uploads new or updated competencies, the vendor administrator needs to review them in order to be able to allocate jobs to the technician.

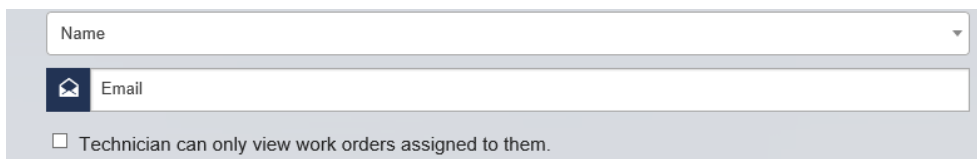
8.1.1. Notification of Updated Competencies

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

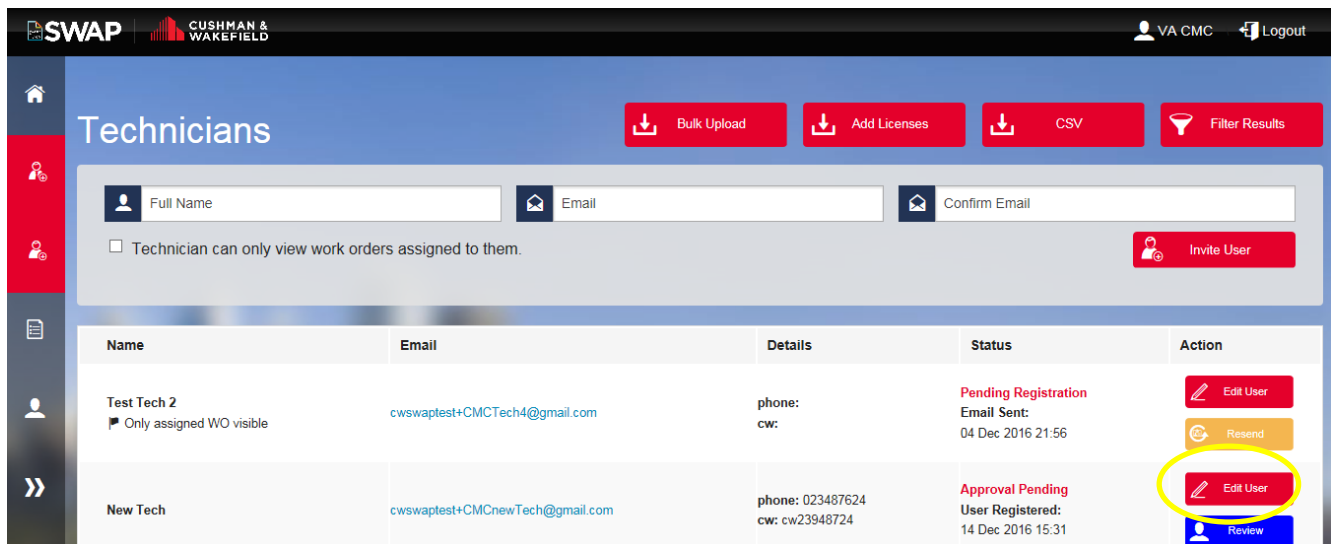
To enable technicians to only view work orders assigned to them by a vendor administrator, check “Technician can only view work order assigned to them”. If this has not been checked, they will be able to see all work orders issued to the vendor company under the Check In/Out tile on the app. This is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



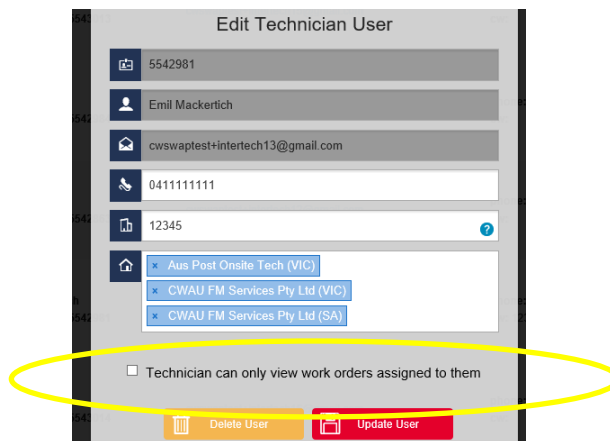
For afterhours shifts, this checkbox should be unchecked to access all work orders. This can be changed via the technician profile on the Vendor Portal see [After Hours Work Order Assignment](#)

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.



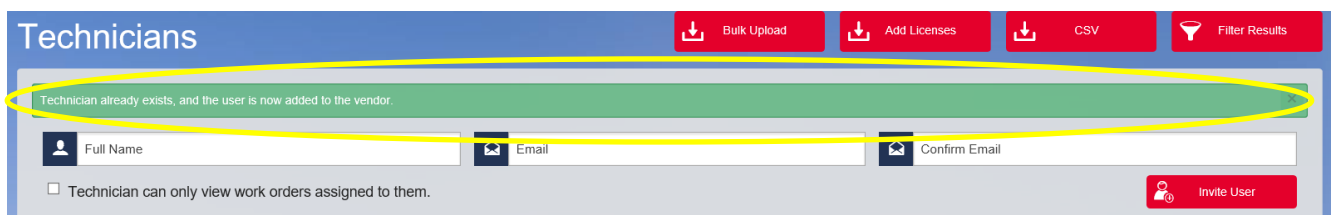
Find the technician (tip: use the [Filter Results](#) button) and click on the Edit User button. Check the “Technician can only view work order assigned to them” checkbox, and click Update User.



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.

ACME Tech3	cswaptest+acmetech3@gmail.com	phone: 04978624 cw: cw237623	Approved User Registered: 23 Dec 2016 10:44	Edit User View
ACME Tech2	cswaptest+acmetech2@gmail.com	phone: 0411111111 cw: 43432423	Approval Pending User Registered: 23 Dec 2016 09:54	Edit User Review

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

8.3.1. Error when adding Bulk Uploading Existing Technicians

If you are bulk uploading technicians and receive this error:

john@johnselectrical.com.au Email already exists/is not a valid Email address.

Simply re-add the email address separately (not as part of a bulk upload) and it will add the technician to your branch.

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 can see the technician under their list.

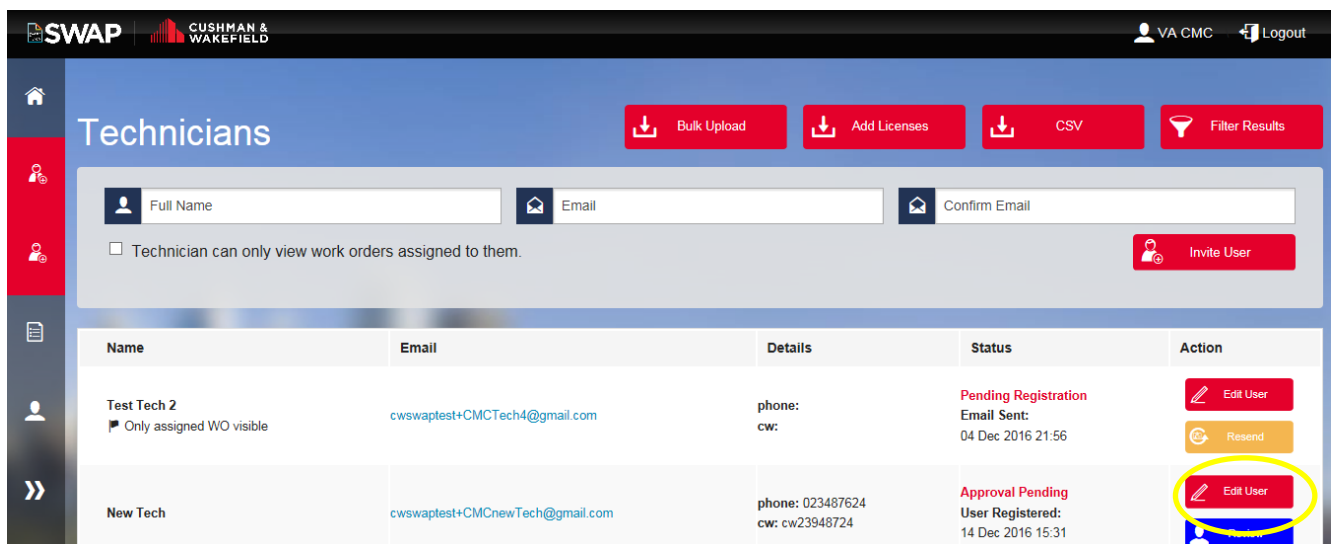
How Vendor Branches work: In the example, Company XYZ has four branches – Branch A, Branch B, Branch C, Branch D:

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

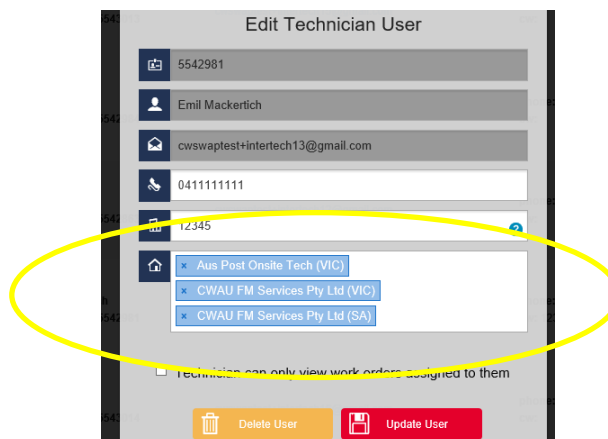
8.4.1. Adding Technicians from other Branches to your Branch

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.



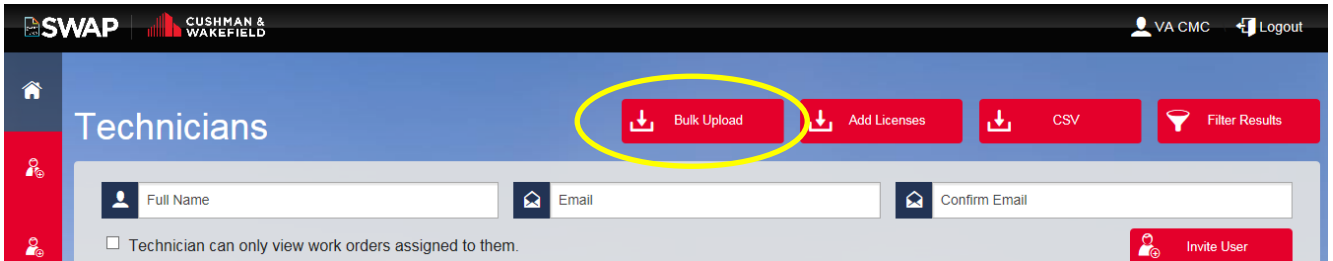
Search through the list of technicians for the tech who will be on call. (Tip: use the [Filter Results](#) button to search for the name). When you have found the tech, click on the Edit User button next to their name.

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

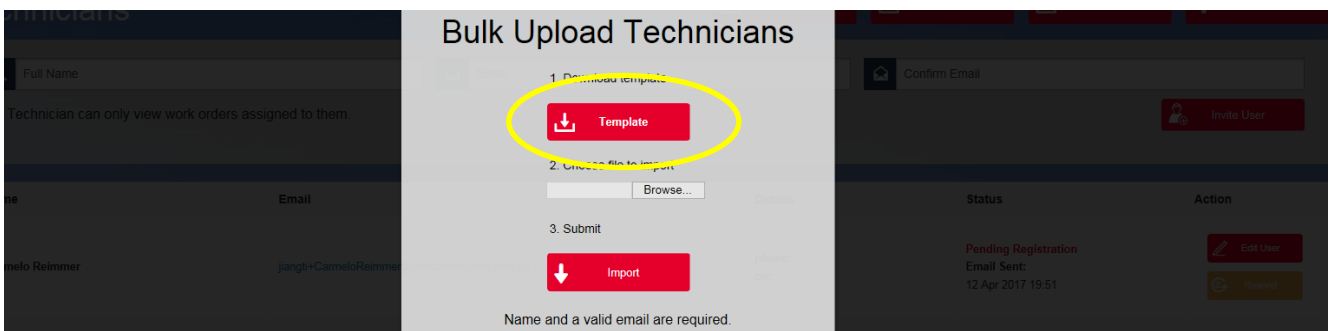


8.5. Bulk Invite Technicians and Workers to SWAP

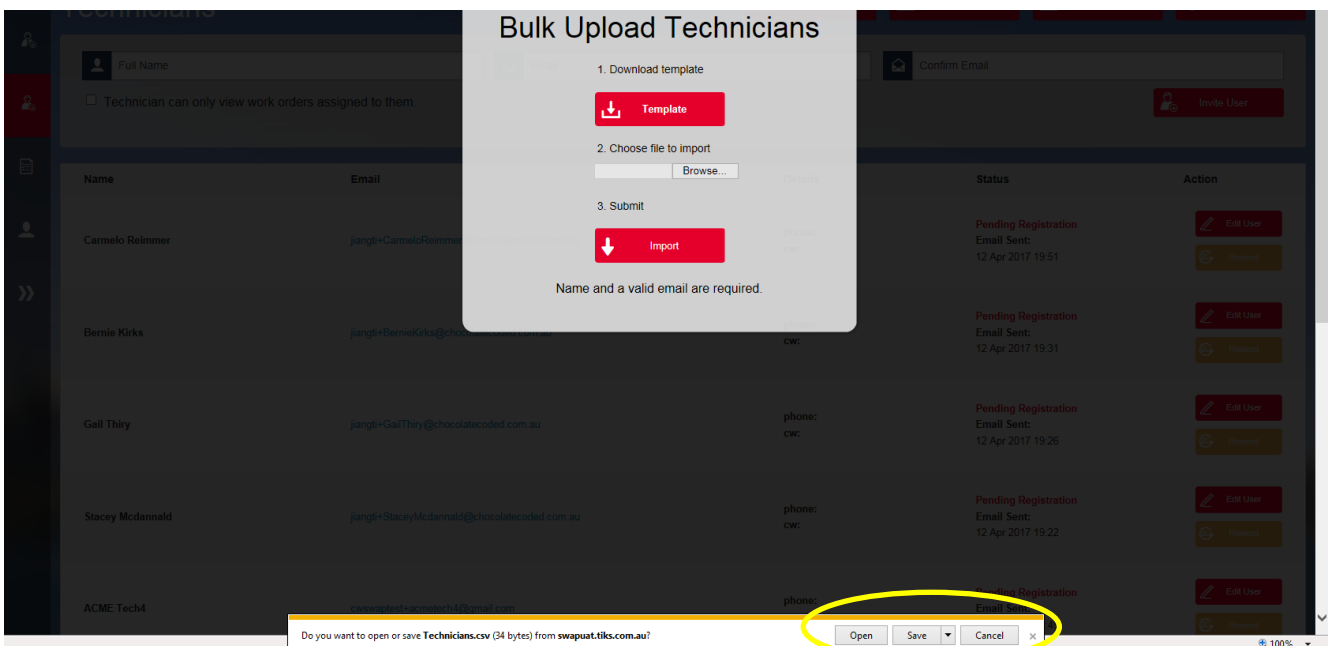
To bulk invite technicians, go to My Technicians. At the top right of the screen you will see a Bulk Upload button. Click on this to download the .csv file required to fill in technician information.



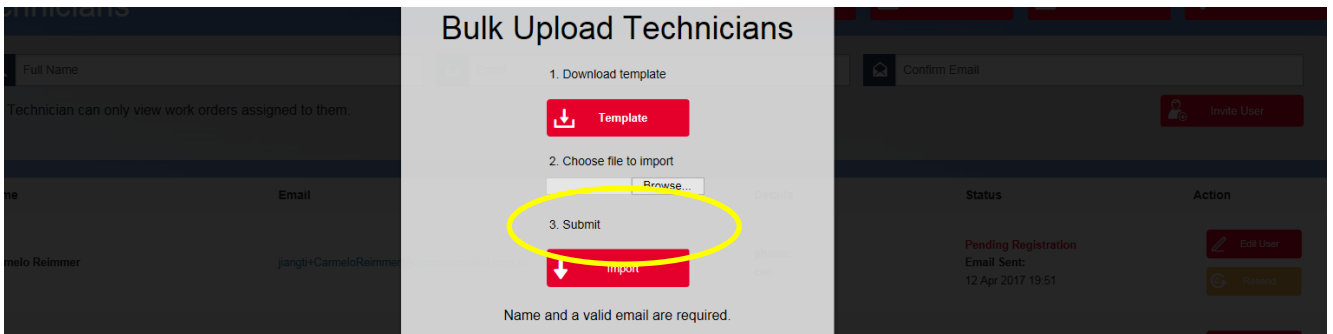
Choose Download Template to download the template to your desktop.



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

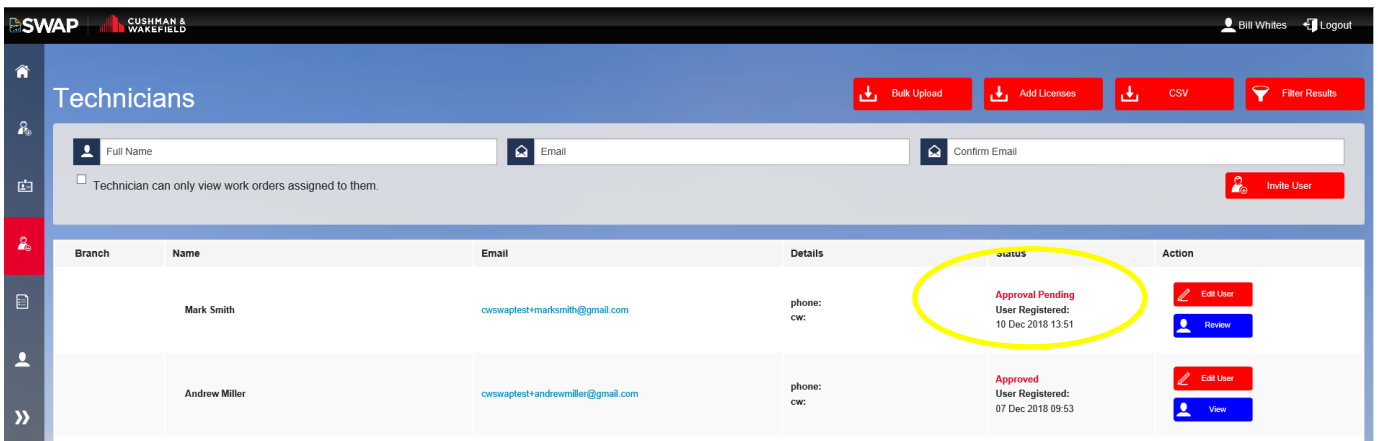


Click on Import to submit the file. It will send out registration invitations to all technicians listed within the file.

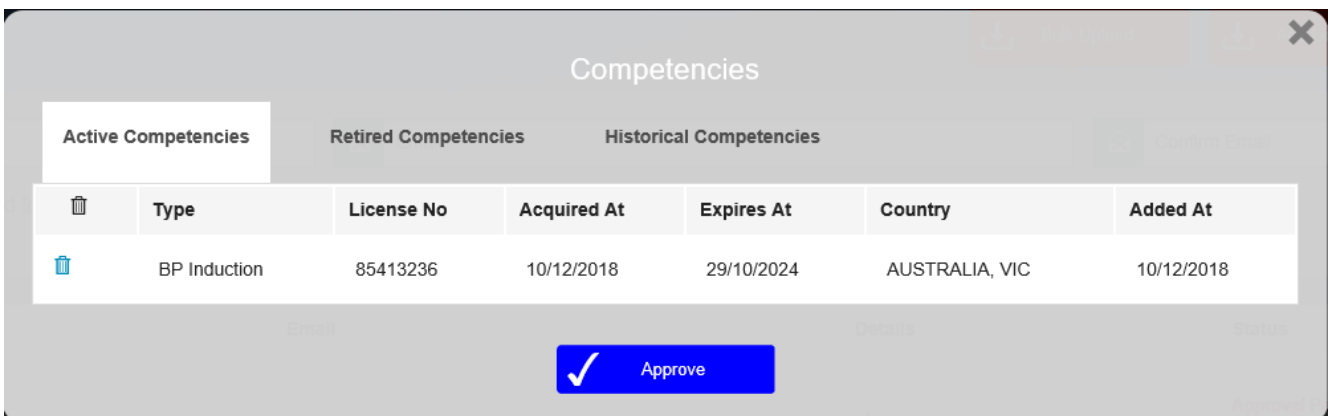


8.6. Approving Technician and Worker Competencies

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.



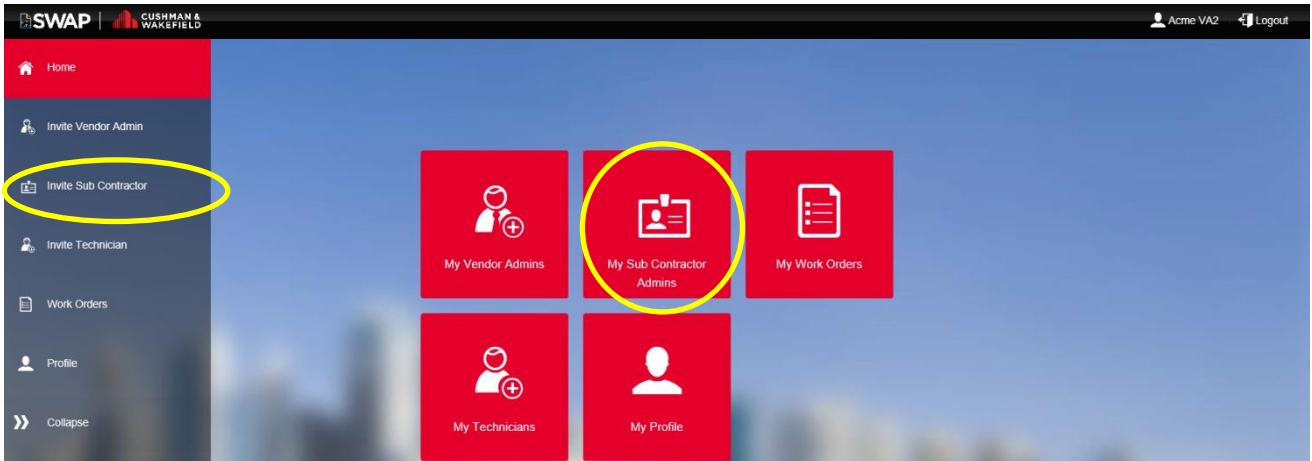
To conduct the review, simply click on Review to review the competencies the technician has uploaded



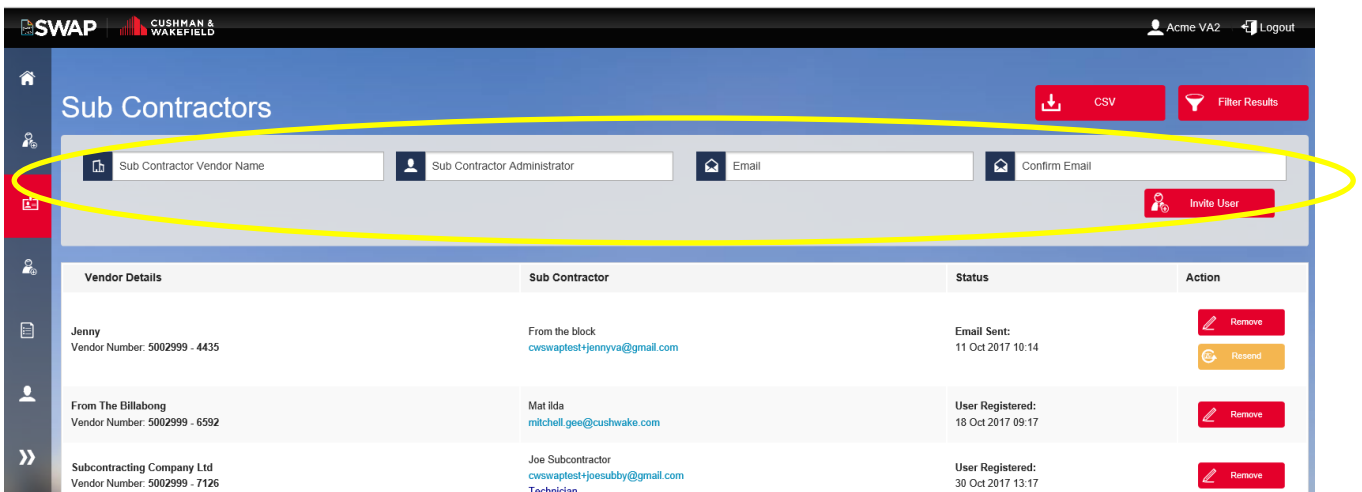
If the competencies are correct, click approved. Now the technician can be assigned work orders.

9.0 Invite Subcontractor Admins

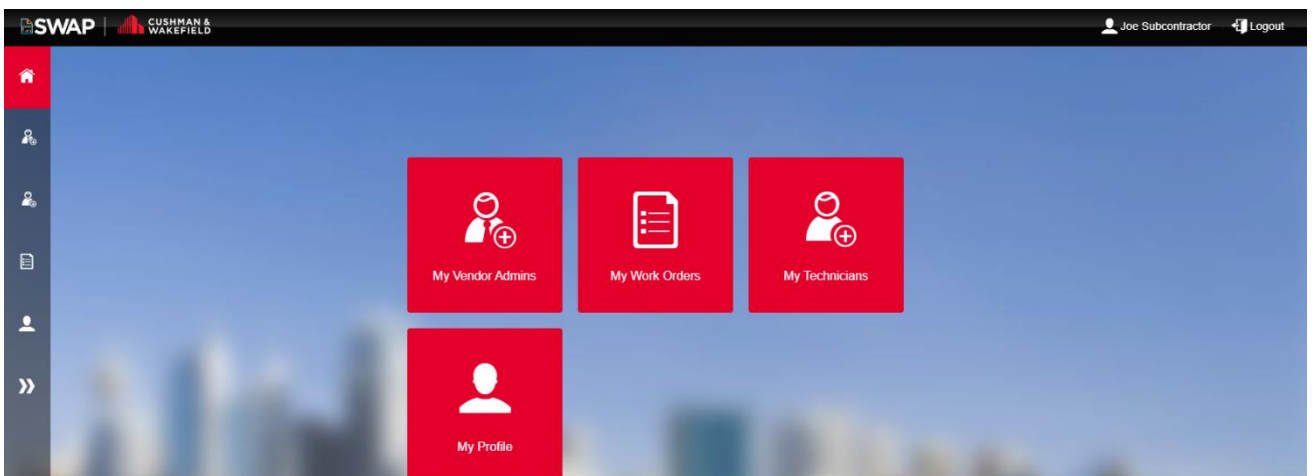
Inviting a Subcontractor Admin allows you to allocate work to your subcontractors. The Subcontractor VA registers and then invites all their technicians. They can manage the work order via their own SWAP Vendor Admin Portal. The original VA will still have visibility over the work order while it is subcontracted 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.



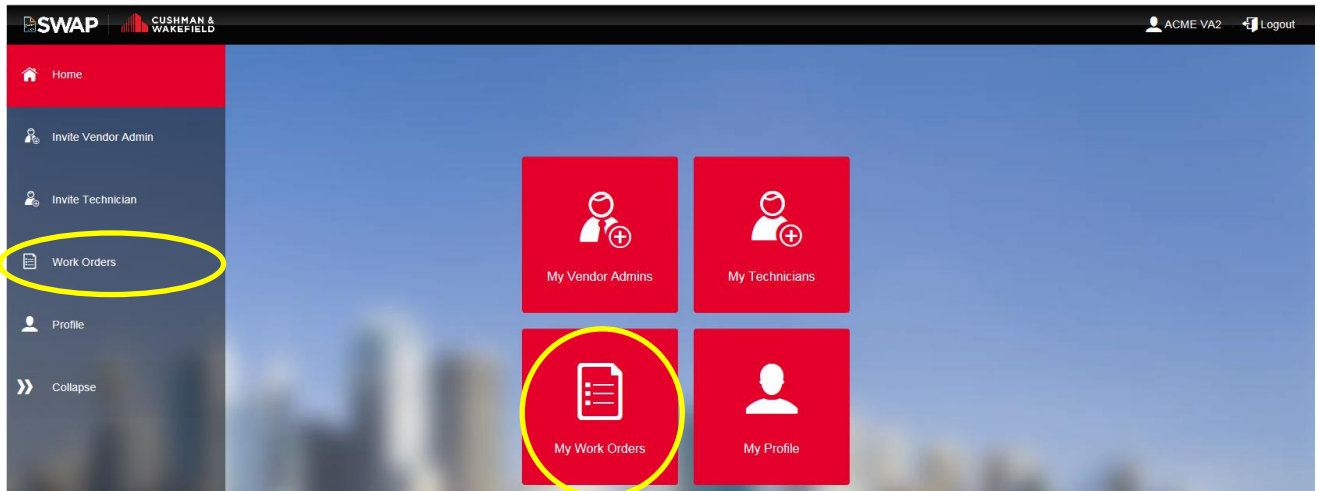
9.1. Subcontractor Vendor Admin Dashboard



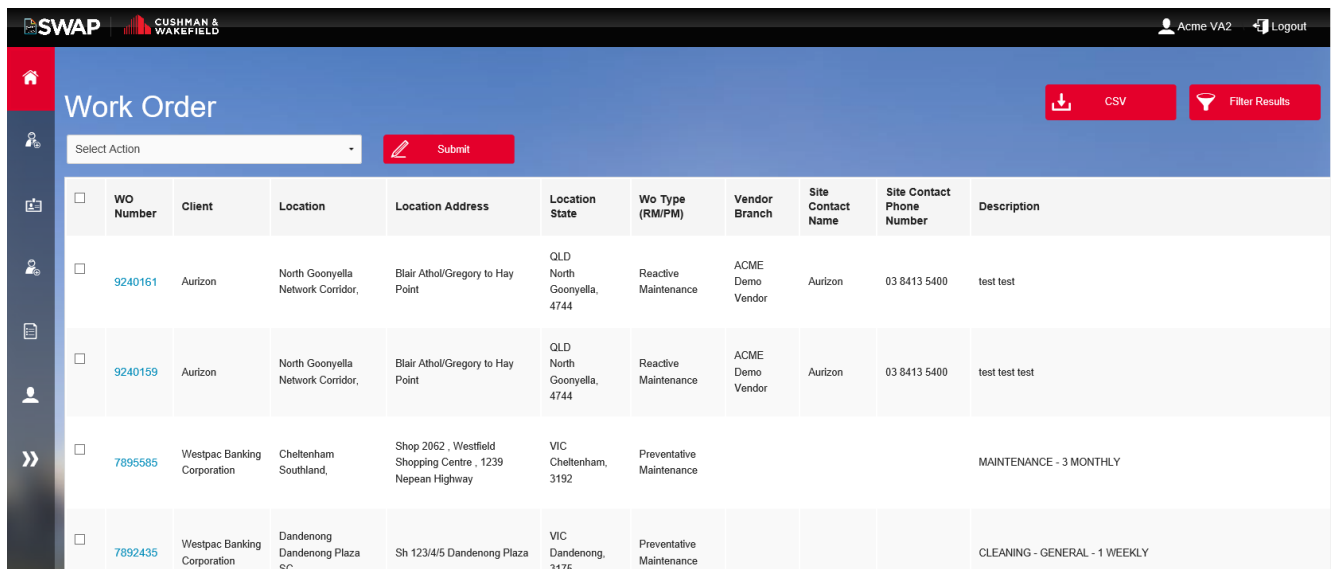
Note: Subcontractor Admins follow the same instructions as listed in the Vendor Administrator User Guide for all tasks. However, if a work order has been subcontracted, it cannot be subcontracted to another subcontractor.

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 123/4/5 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 123/4/5 Dandenong Plaza	VIC Dandenong, 3175	Preventative Maintenance				CLEANING - GENERAL - 1 WEEKLY

This will take you to the details screen:

Work order Number: 9240161
Priority: P4 - Release
Status: Entered - Issued
Region: -

Issue Description: test test
Required Onsite: 30/11/2017 11:56:00
Expected Rectification: 30/11/2017 11:56:00
Extended to: -

PO Number: 39976906
Site Contact: Aurizon

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: -

Vendor: ACME Demo Vendor
Vendor Branch: ACME Demo Vendor

PO Amount: \$500
Site Contact Number: 03 8413 5400

Technician Details
No Assigned Technicians

PRA & Permits

Form Title	Submitted At	Form Type
No PRA or Permit		

PRA Approve/Declined
No PRA Records currently

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

Work order Number: 9240161
Priority: P4 - Release
Status: Entered - Issued
Region: -

Issue Description: test test
Required Onsite: 30/11/2017 11:56:00
Expected Rectification: 30/11/2017 11:56:00
Extended to: -

PO Number: 39976906
Site Contact: Aurizon

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

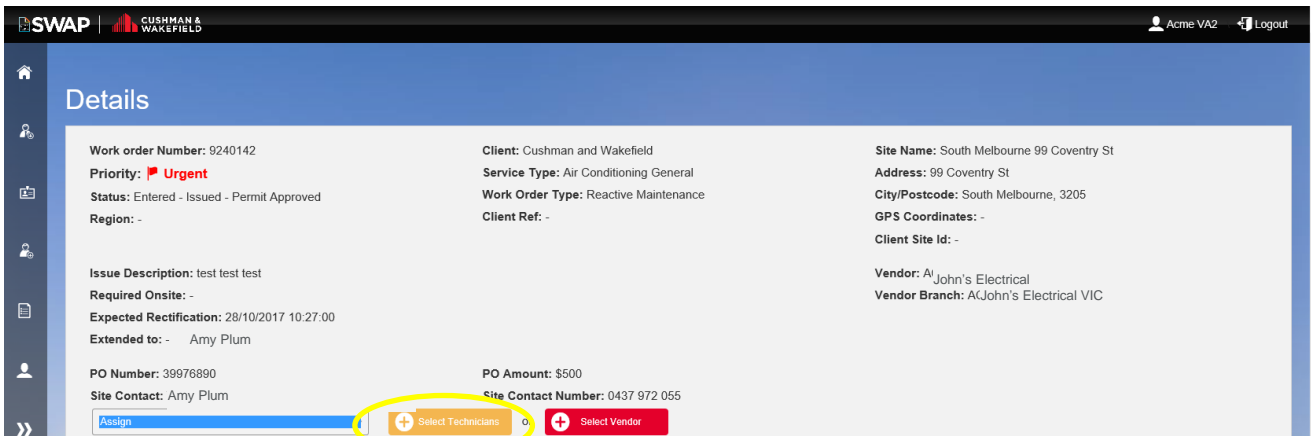
Site Name: North Goonyella Network Corridor
Address: Blair Athol/Gregory to Hay Point
City/Postcode: North Goonyella, 4744
GPS Coordinates: -
Client Site Id: -

Vendor: ACME Demo Vendor
Vendor Branch: ACME Demo Vendor

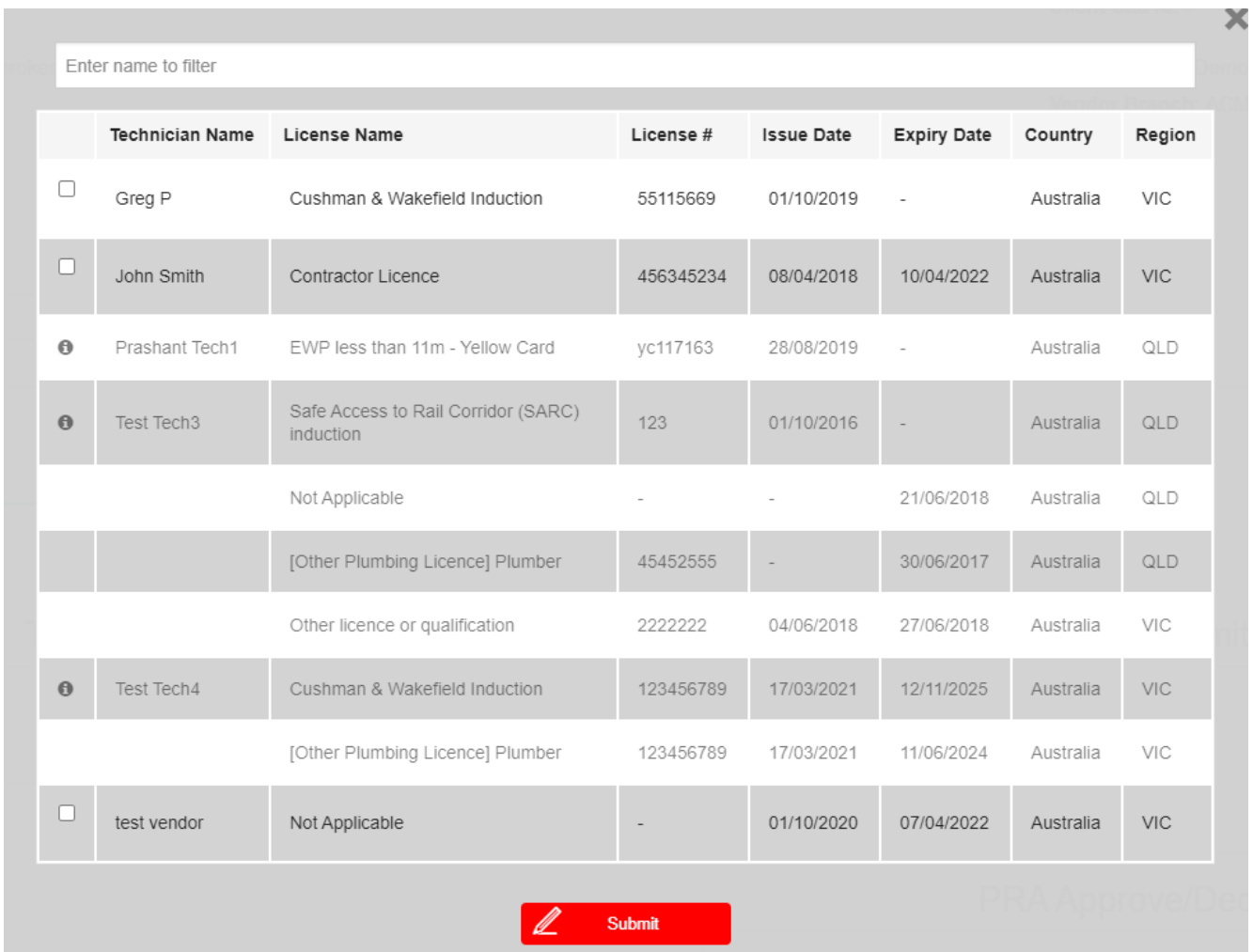
PO Amount: \$500
Site Contact Number: 03 8413 5400

Select Action
 Decline
 Assign

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



A full list of your technicians will appear:



If you need to use a technician with an expired competency, they can update their details in real time, so you can approve their changes and allocate a work order immediately. Select the technician and click Submit to assign it to them. Once you have assigned a work order to a technician, it will appear on their SWAP app under My Work Orders.

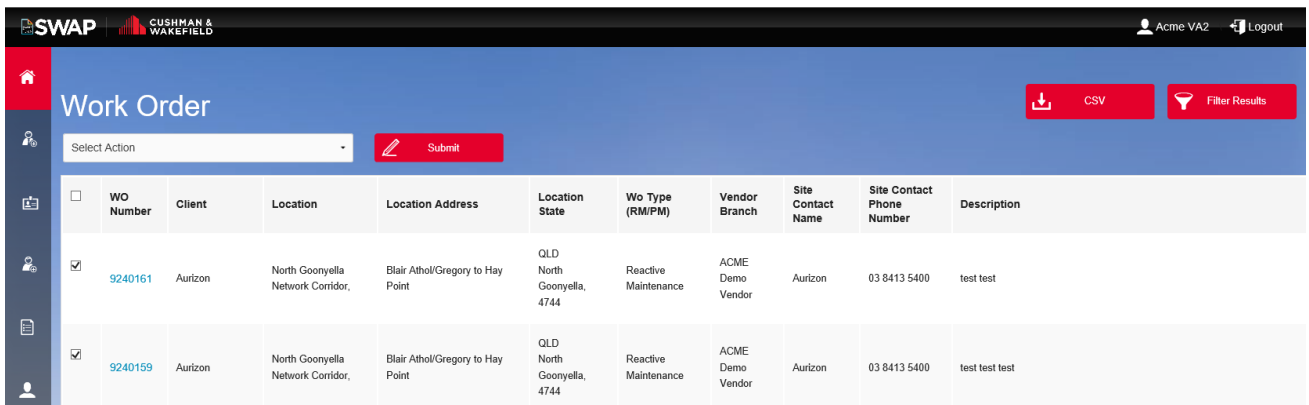
Note: If a technician is greyed out, you will be able to hover over the **i** icon to check why they are ineligible to be assigned the work order. This may be due to:

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

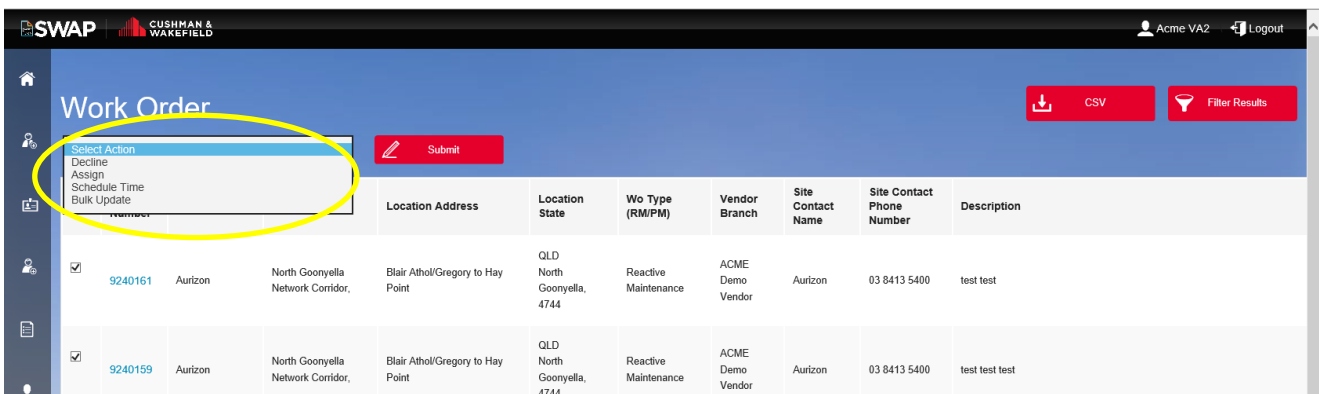
i	Prashant Tech1	EWP less than 11m - Yellow Card	yc117163	28/08/2019	-	Australia	QLD
<div style="border: 1px solid black; padding: 5px;"> <p>Technician Disqualified</p> <p>This technician is uneligible to be assigned this work order, as they have following missing mandatory competencies</p> <ul style="list-style-type: none"> * [Other Plumbing Licence] Drainer </div>							
<ul style="list-style-type: none"> 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
<div style="border: 1px solid black; padding: 5px;"> <p>Technician Disqualified</p> <p>This technician has the following expired competencies, which require updating</p> <ul style="list-style-type: none"> * Competency Other licence or qualification expired at 2019-02-01 </div>							
<ul style="list-style-type: none"> The technician is on 'Approval Pending' status 							
i	Test Tech4	Cushman & Wakefield Induction	123456789	17/03/2021	12/11/2025	Australia	VIC
<div style="border: 1px solid black; padding: 5px;"> <p>Technician requires approval from vendor.</p> </div>							
		[Other Plumbing Licence] Plumber	123456789	17/03/2021	11/06/2024	Australia	VIC

10.1.2. Bulk Assigning Work Orders to Technicians

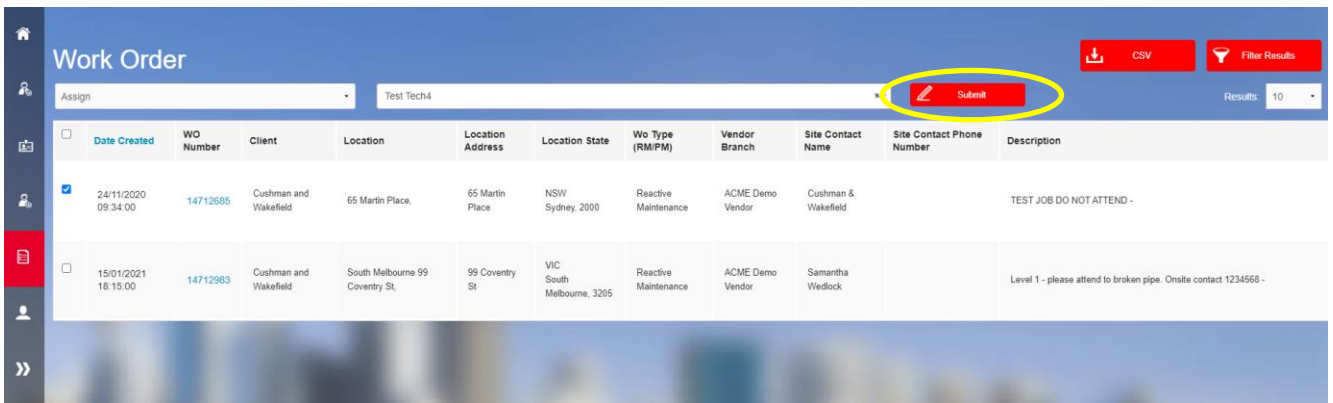
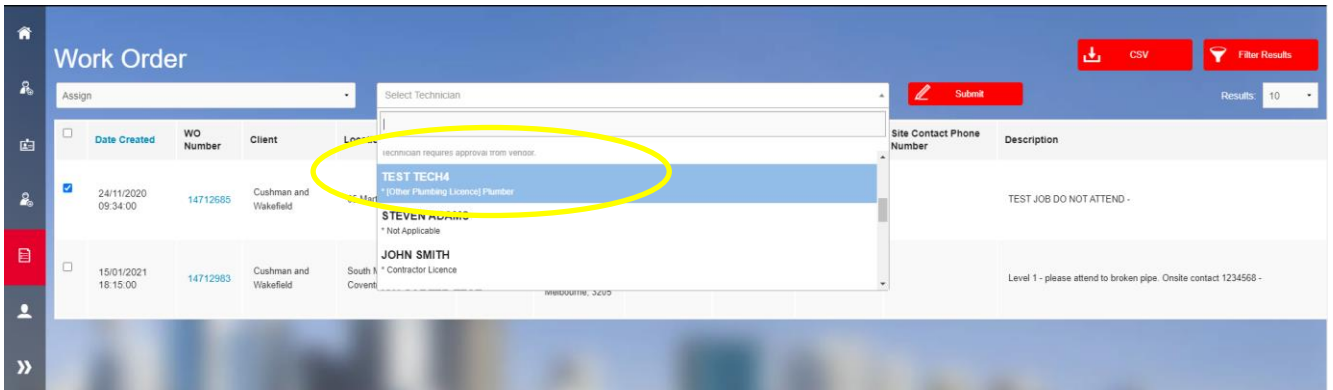
You can bulk assign a work order by Filtering by a client and selecting the work orders you would like to assign to one technician. You can assign a work to more than one registered technician by selecting the same work order and adding additional technicians.



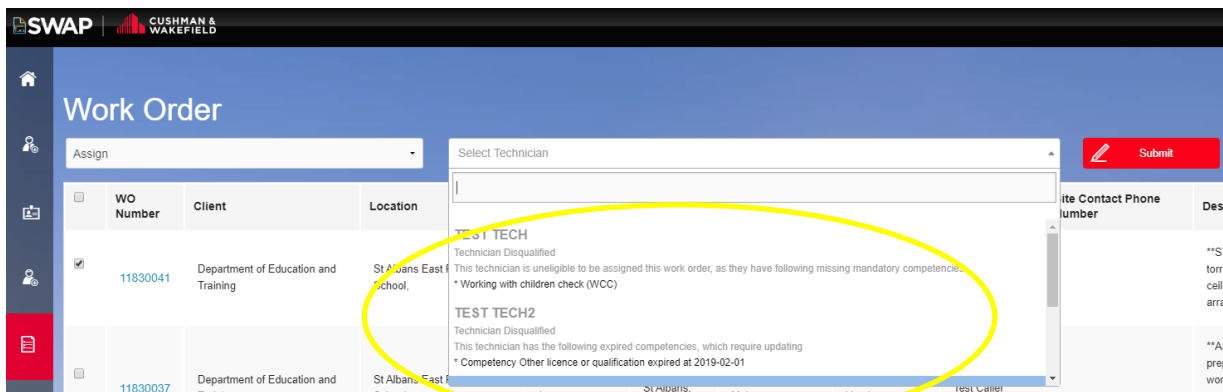
Then from the Select Action drop down, choose to:



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

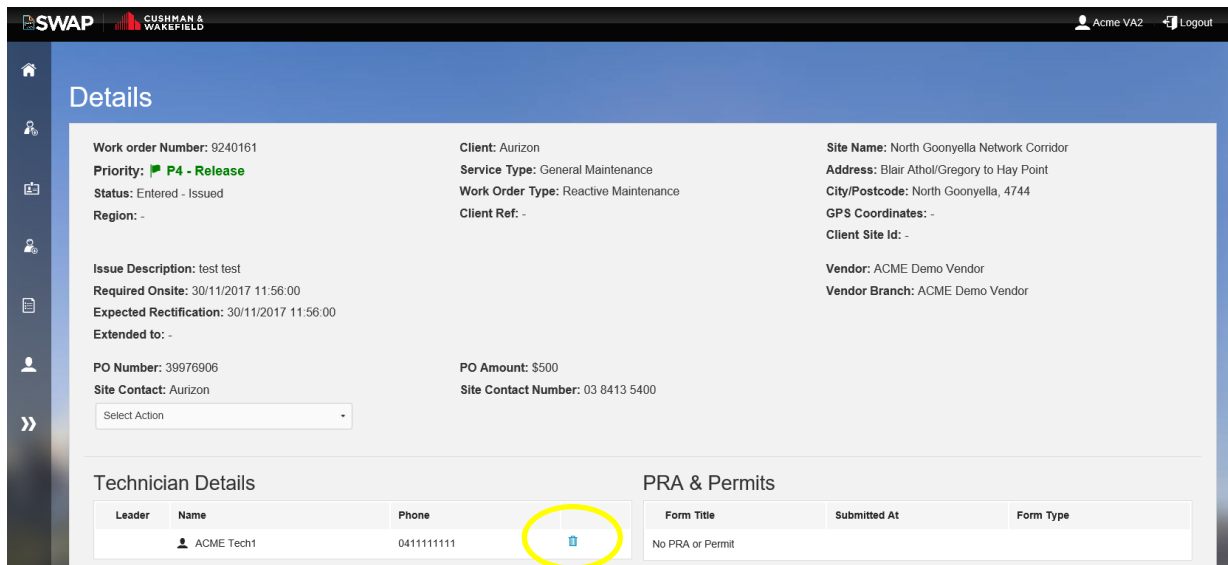


Note: If a technician is Disqualified, there will be a note under their name advising of why they are ineligible to be assigned the work order. This may be due to them having an Expired competency, a missing Mandatory Competency or may be that they are on 'Approval Pending' status.

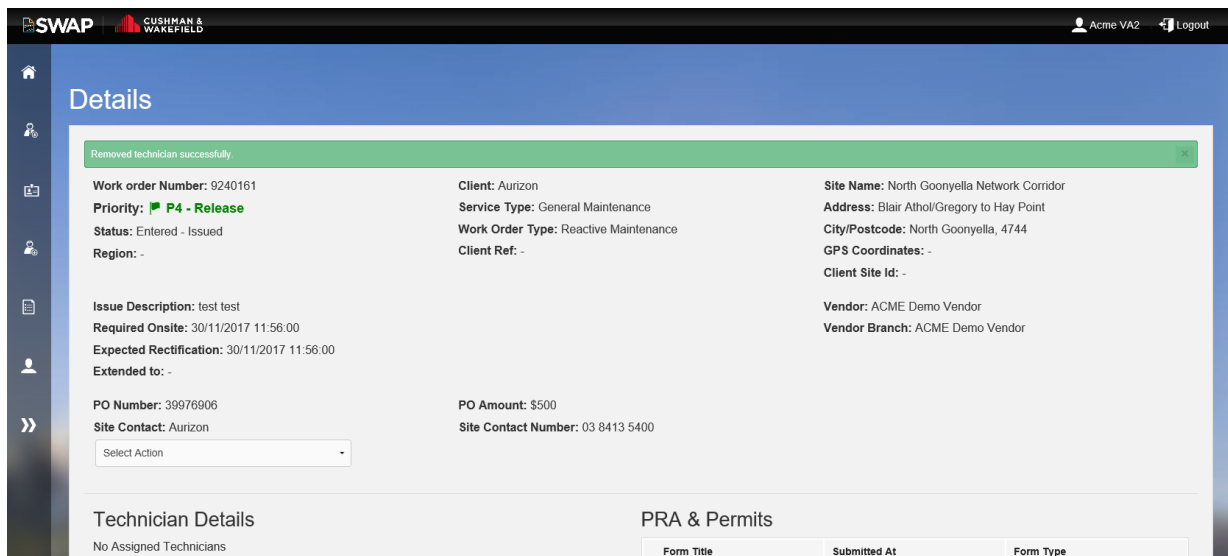


10.1.3. Reassign a Work Order/Remove Technician from Work Order

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.



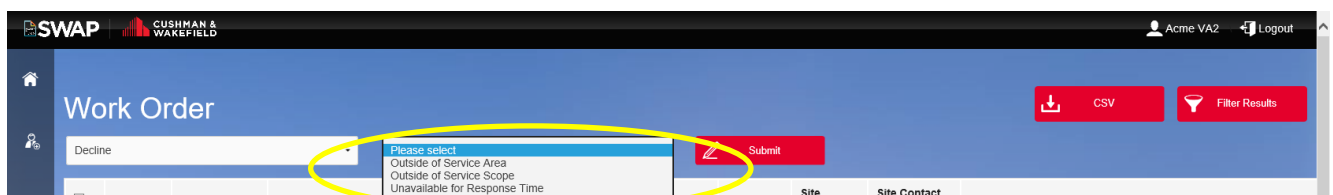
To reassign to another technician, follow the instructions in [Assign a Work Order to a Technician](#)

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.

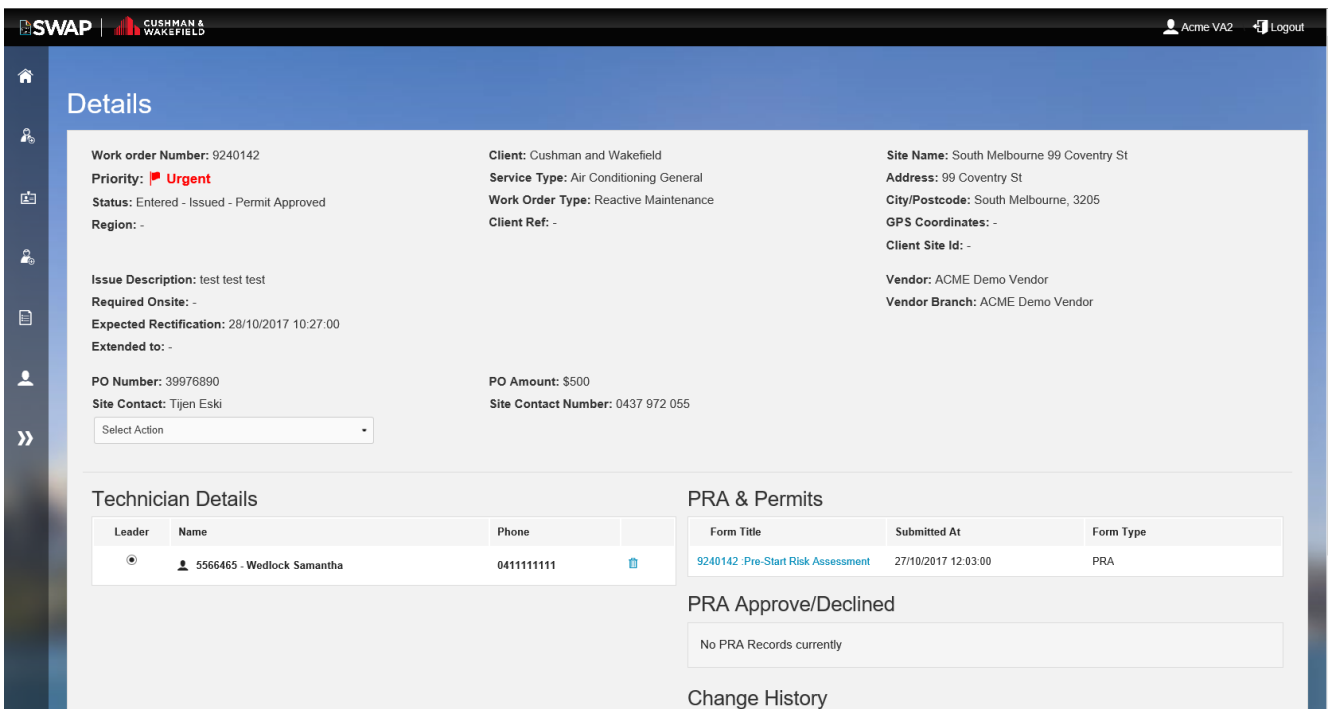


NOTE: If you're declining a work order that requires attendance and rectification within 24hrs, then you must call through to the CXC.

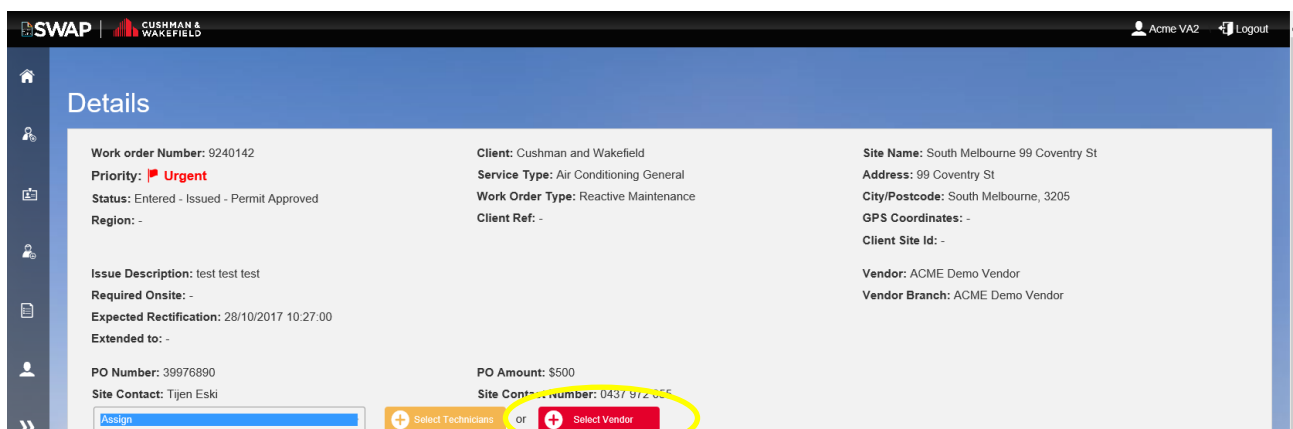
10.2. Subcontractor Admin Work Order Management

10.2.1. Assigning a Work Order to a Subcontractor Admin

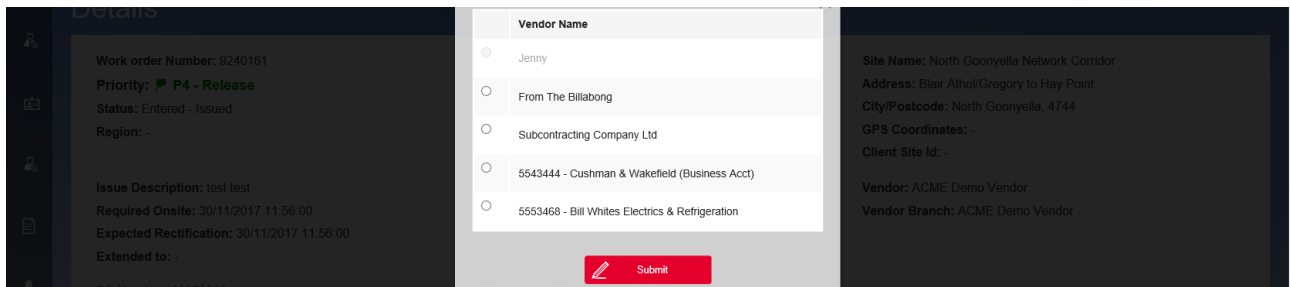
Go to My Work Orders and select the work order number to view the Work Order Details screen.



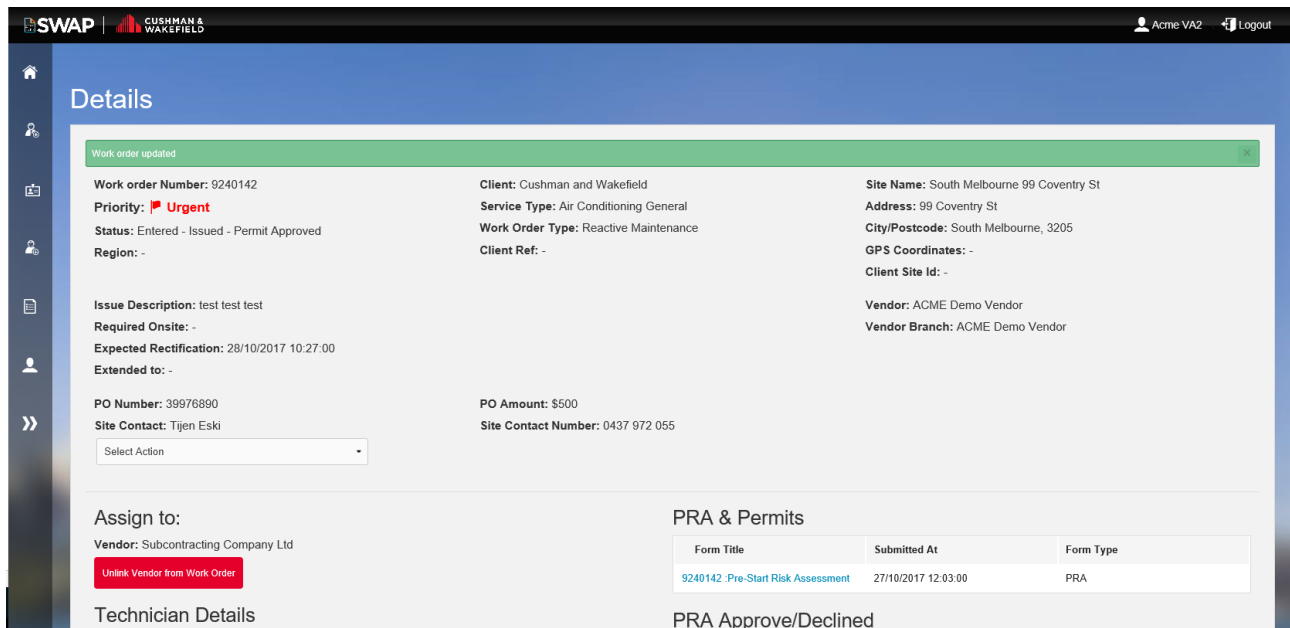
Click on the Select Action dropdown menu and select Assign, then select 'Select Vendor'.



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](#).

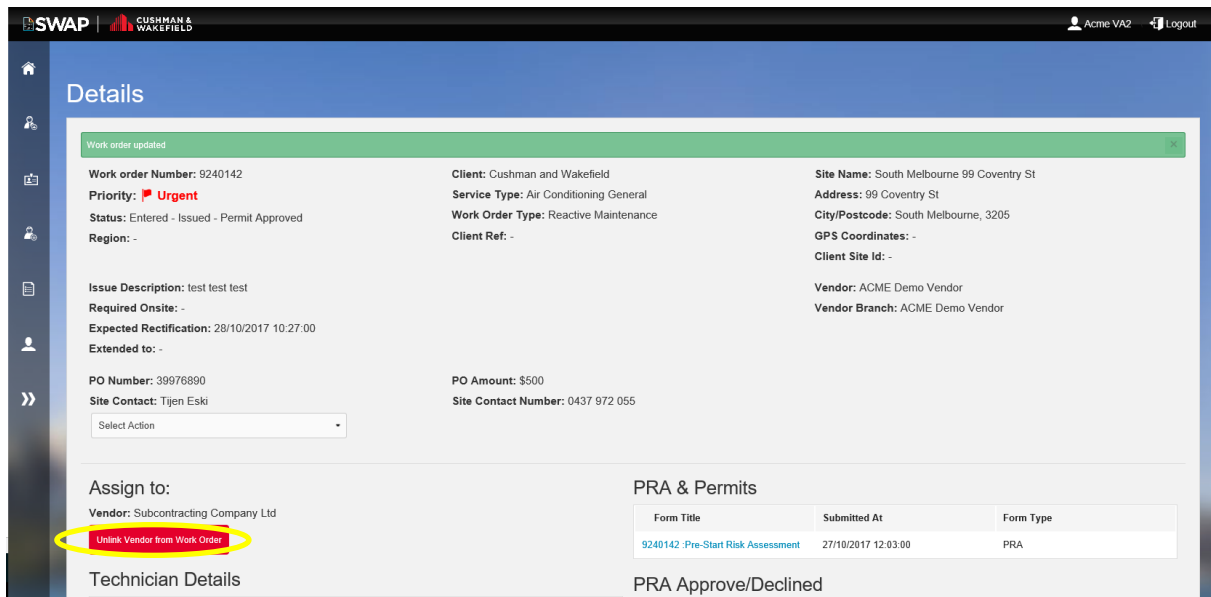
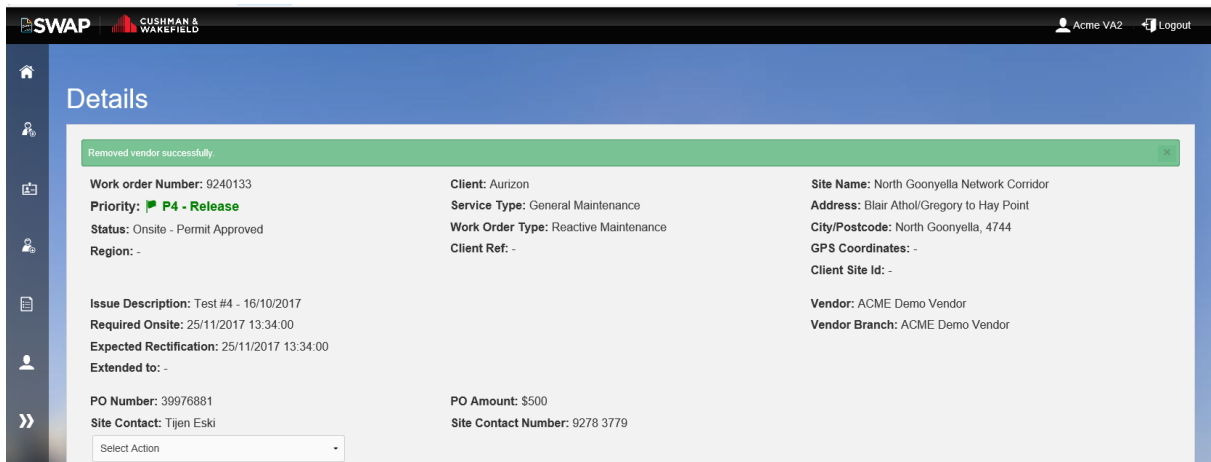


10.2.2. Managing Declined Subcontractor Work Orders

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.

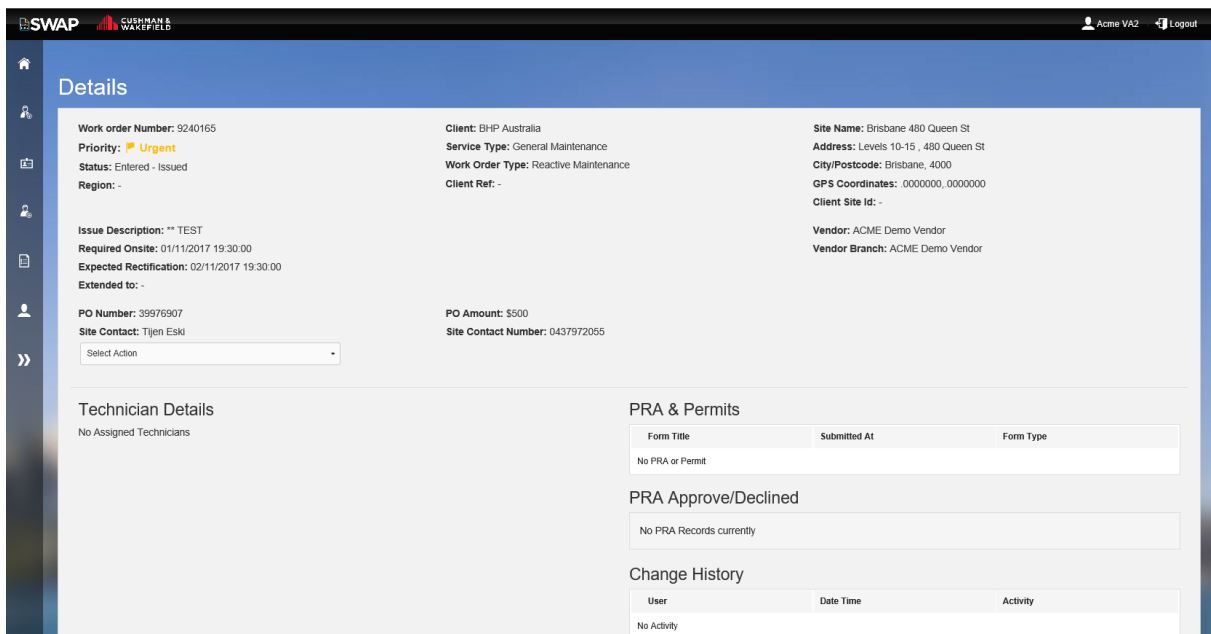
10.2.3. Reallocating a Work Order to another Subcontractor

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.

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.



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

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		

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 02:54:38	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	2017-08-01T14:54:38+10:00	PRA Submit
ACME Tech1	2017-08-01T14:55:25+10:00	Permit Submit
ACME Tech1	2017-08-01T14:58:00+10:00	Awaiting Permit Approval
ACME Tech1	2017-08-01T14:58:04+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	Client
Location	Location Address
Location State	Work Order Type
Vendor Branch	Site Contact Name
Site Contact Phone	Description
Service Type	Status
Start Date Created	End Date Created
Start Date Onsite	End Date Onsite
Start Date Completion	End Date Completion
Assignment Status	Assigned To
Priority	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.

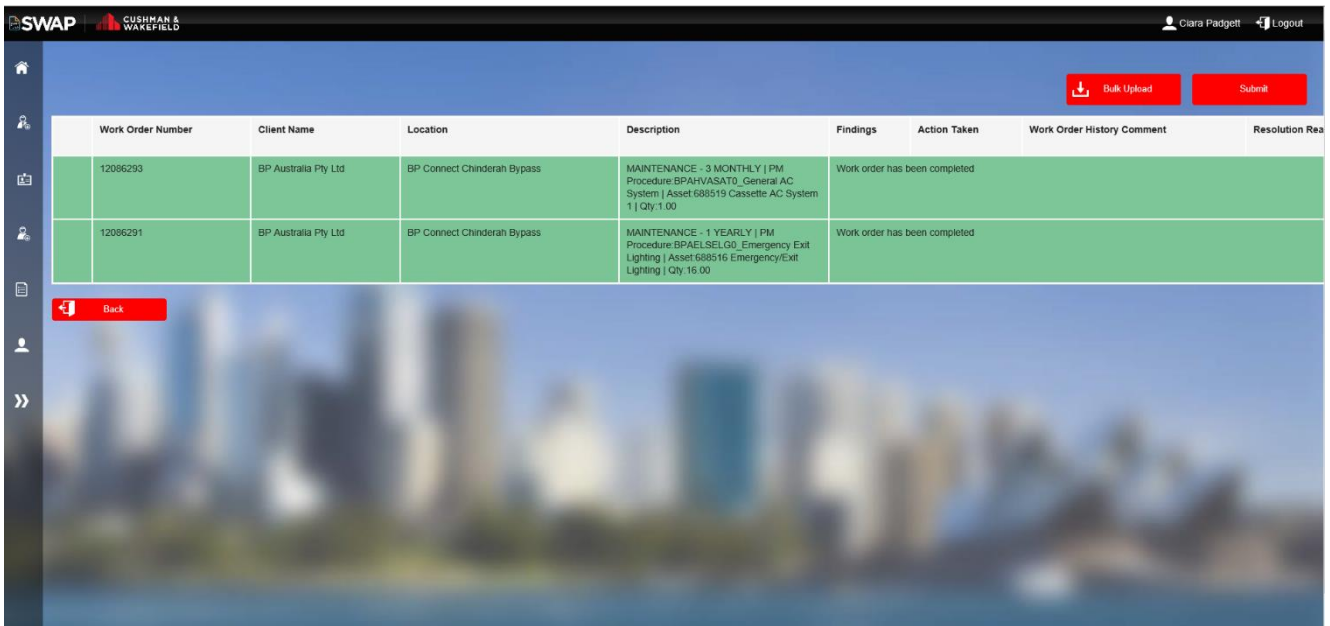
Once all fields are filled out. Select the red Submit button in the top right and you then acknowledge that all work orders are being closed.

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 Rea
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:

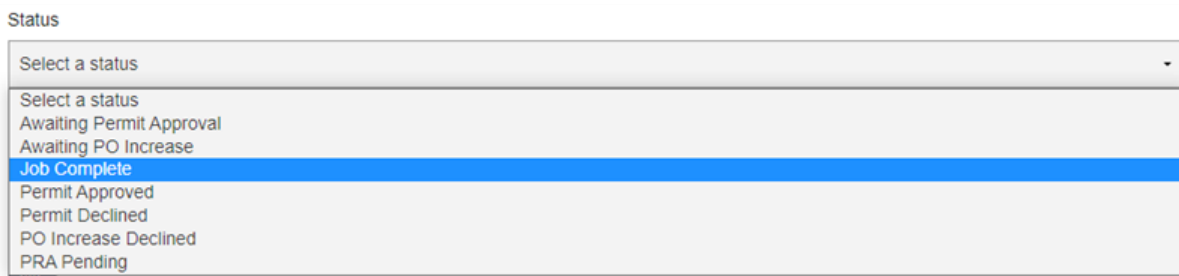
- **Reactive Maintenance Work Order cannot be bulk updated:** This work order cannot be closed as it is not a Preventative Maintenance work order.
- **Work Order is already closed:** The work order has been closed by another user.
- **Work order cannot be bulk updated. Please ensure the technician has 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 be able to view all PRAs, permits, onsite and closure times for RM and PM work orders. After 72 business hours, the work orders will be removed from the Vendor’s 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 specific work orders:

When you have chosen the categories to filter, click on Filter in the bottom left hand corner to filter to the results page.

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 pending registrations

14.0 Support Function

There is a new Support option for Vendor Administrators within the Web Portal.

Selecting the '?' Support 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.