SWAP | Work Order Lifecycle

Below you will find the steps that need to be taken to complete a work order using the SWAP Platform; from a Vendor Administrator assigning the works in the SWAP Portal through to a Technician updating a work order to on-site and closing the work order out in the SWAP app.

Assigning a Work Order

To assign a work order to a technician in SWAP, the Vendor Administrator must select the work order via the My Work Order tile in the Web Portal. From here, selecting the 'Assign' option from the select action drop down.
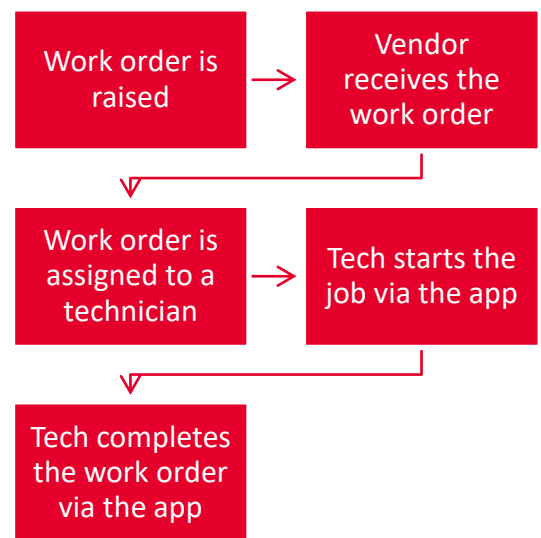
| Assign ▾ | ⊕ Select Technicians | or | ⊕ Select Vendor |

Clicking the yellow 'Select Technicians' option will load a list off all Technicians registered to your Profile.

You can also **bulk assign** works to a technician from the work order summary screen. Simply filter by a client, select the check boxes next to the relevant work orders and select assign from the action drop down

Once you have selected the relevant technician, the work order will be loaded to their mobile app.

Note: If you do not select the "Technician can only view work orders assigned to them' box when registering a technician, this step is not required as all work orders will be visible to them via the Check In/Out tile.

Work order is raised → Vendor receives the work order

Work order is assigned to a technician → Tech starts the job via the app

Tech completes the work order via the app

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SWAP | Work Order Lifecycle

Commencing Work

To Commence a Work order in SWAP, the technician must log into the Mobile Application and find the work order either via the Check In/Out Tile or the My Work Orders Tile. This will show all Essential Site Information along with the Work Orders details.

Once in the Work Order, select the 'Start Job' option at the bottom of the screen to populate the Pre-Start Risk Assessment (PRA) to fill out. Once this PRA is submitted, the work order will be placed 'Onsite'

Completing Works

To Complete a Work Order in SWAP, the technician must select the 'Complete Job' option at the bottom of the work order detail screen (Where the Start Job option was previously). Once selected, their will be a section to add any notes to the work order, as well as to amend the onsite & completion times if required. Once submitted, the work order will automatically be closed in the system and will be ready for invoicing.

SYSTEM
Safe Work Assurance Platform (SWAP)

COMPATABILITY REQUIREMENTS
- Registered in SWAP
- Approved, Qualified Technicians
- SWAP Application Downloaded

KEY CONTACTS
Application Support Team:
1300 149 286 (1)
AU.Application.Suport@cushwake.com

SWAP Support NZ:
0800 888 068
NZ.SWAP@cushwake.com

Finance Enquiries:
FinanceHelpdesk@cushwake.com

FURTHER INFORMATION
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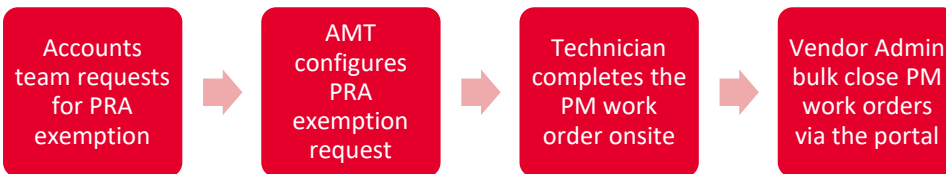
SWAP | PRA Exemption Process

It allows technicians to bypass the PRA submission process for specific PM work orders and it permits vendor administrators to perform bulk closures via the portal.

This is not applicable to all PPMs; Account teams must liaise with the Asset Management Team to have their chosen service types configured in JDE.

How it works:

| Accounts team requests for PRA exemption | → | AMT configures PRA exemption request | → | Technician completes the PM work order onsite | → | Vendor Admin bulk close PM work orders via the portal |

How to Request:
Accounts team would have to request the Asset Management team to place the PRA exemptions on specific PM service types (i.e. Cleaning etc.)

Note: If you are a supplier please email your request to the Application Support team.

Processing:
Once the PRA exemptions have been put in place, PM work orders for the requested service types will automatically show 'No PRA Required' status instead of 'Dispatched' once they are generated.

The new status will also be visible via SWAP and will prompt Vendor Administrators to perform bulk closure without getting technicians to update them via the app.

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SWAP | Bulk PRA

It allows technicians to submit bulk PRA for multiple Preventative maintenance work orders under the same site. We do

Bulk PRA's 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, technicians will need to resubmit a PRA for this work order.

Who can use it?
SWAP users with technician access are able to use the Bulk PRA function via the app.

How it works:
1. To conduct a bulk PRA, just simply head to the work order summary screen on your app then select ⬗ icon on the top right corner of the page. This will take you to the Bulk PRA selection page.
2. The Bulk PRA page will allow you to select multiple or all PPM work orders grouped by site. This can be conducted per technician for each location.
3. Select the 'Group PRA' button at the bottom of the page to load the PRA form

<div style="background:#e2231a; color:white; text-align:center; padding:8px;">Group PRA</div>

4. Submit the Bulk PRA. (Note: Where applicable approval is still required as per standard PRA process across selected accounts).
5. Technicians will be prompted upon selecting Start Job for each work order that a Bulk PRA has been submitted against, technicians are required to confirm if there are any changes to the PRA.

Note: Any work orders that are not placed onsite on the same day will revert back to the original work order status and will be required to submit a new PRA upon returning to site.

SWAP | Bulk Closure

It allows Vendor Administrators to bulk close PPM work orders that are on status 'No PRA Required' or 'Onsite-Permit Approved' via the portal.

Who can use it?
SWAP users with Vendor Administrator access are able to perform Bulk Closure via the web portal. There are 2 ways to perform SWAP bulk closures - via the Bulk Update page and via the CSV upload.

How it works:
1. To conduct bulk closure, navigate to the My Work Order tile and use the filter results button to search for the work orders needing to be closed
2. 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.
3. 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.
4. There are 2 options to conduct Bulk Closure:
    1. Manually fill out the template via the portal
    2. Simply download the template via the 'Bulk Upload' button and fill out all the required details.
5. Once filled out, save the file and import it back into SWAP using the 'Bulk Upload' button.
6. Select the red Submit button on the top right, Vendor Admin will be required to acknowledge that all work orders can be bulk closed.

Note: The Bulk Closure function is not available for:
* Work orders are Reactive Maintenance jobs
* Work order that are not PRA exempted or PRA Approved
* Work orders that are not placed on site
* Work orders already closed off in SWAP
* Incorrect work order number entered
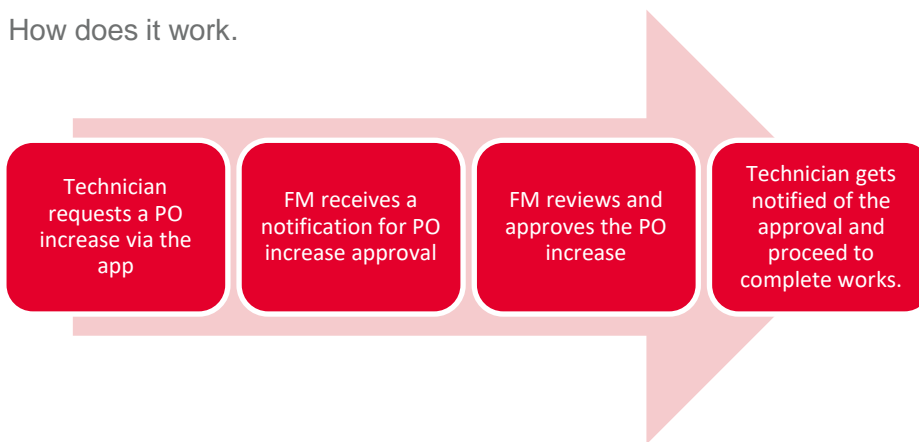
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SWAP | PO Increase

If works exceed the pre-approved PO amount, technicians can request an increase via the SWAP app. An approval notification gets sent through to the primary FM of the site for approval. Once approved, technician can then go ahead and complete works.

Who can use it?
Any C&W account that requests it. Accounts team can request to have the PO increase function enabled for their client by sending the Application Support team an email.

How does it work.

| Technician requests a PO increase via the app | FM receives a notification for PO increase approval | FM reviews and approves the PO increase | Technician gets notified of the approval and proceed to complete works. |

Must know:
- Both supplier and FM must be registered in SWAP to use
- For push notifications to work – users must be logged into application
- FM Approvals can be done from portal or application
- These are all done in real time
- CXC will update PO amount in JDE.
- FMs are still required to do final PO approval in the back of JDE if set up to do so.

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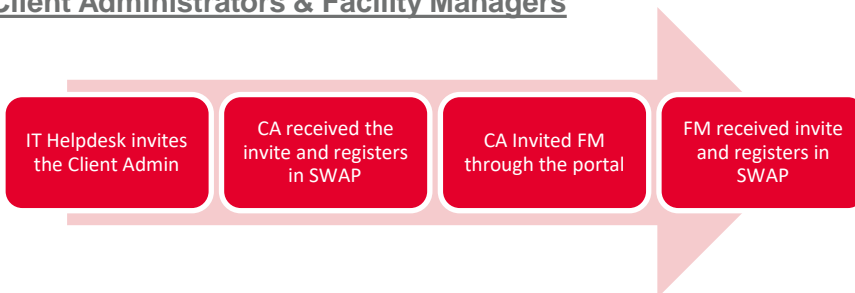
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SWAP | Registration Process

All SWAP users are required to register in the system in order to get access to the application and the web portal. SWAP registration process differs for each user.
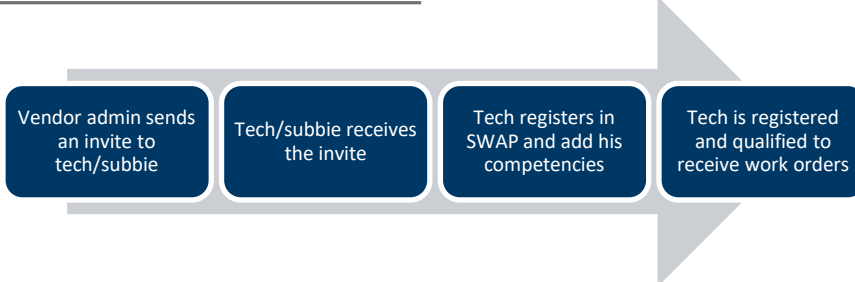
How it works:
Client Administrators & Facility Managers

| IT Helpdesk invites the Client Admin | CA received the invite and registers in SWAP | CA Invited FM through the portal | FM received invite and registers in SWAP |

Vendor Administrator

| Supplier registers with Cushman & Wakefield via Rapid Global | Registration team verifies if supplier is fully-compliant | Registration team sends Vendor Admin an invite to SWAP | VA received the invite and registers in SWAP |

Technicians & Sub-contractors

| Vendor admin sends an invite to tech/subbie | Tech/subbie receives the invite | Tech registers in SWAP and add his competencies | Tech is registered and qualified to receive work orders |

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SWAP | Updating Competencies

Technicians are required to add competencies when registering on SWAP. This allows the system to identify if a technician is qualified to receive and action work orders or not. If one or more of the technician licence are expired, you will then be disqualified from receiving works.

How it works:

Adding New Competencies
- From the portal, head to 'My Profile' tile and click the '+ Competency' button
- Enter your licence details on the 'Add Competency' tab (Country, State, Licence type, expiry date etc.)
- Then click on the 'Add Competency' button

Renewing Competencies
- Under Active Competency list select the Renew Competency ↻ button next to the licence you would like to update
- Enter your renewed licence details and hit submit

Retiring Competencies
- Under the Active/Retired Competency list select the Retire Competency ⊙ button next to the licence you would like to retire
- Question "Are you sure you want to retire this competency?" will pop up
- Hit 'Confirm'

Note: Vendor Admins will need to approve any competency changes before technicians can be assigned work orders.

SWAP | Reviewing Technician Competencies

VA Reviewing Competencies:
Once a technician has updated their competencies, the vendor administrator reviews and approves them to enable the technicians to be allocated work.

To do this, Vendor Admin would have to enter the 'My Technician' tile and click on the Review button next to the technician's name requiring an approval.

Must know:
- **Active competencies - t**his 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.
- **Retired Competencies -** This tab will list all competencies that you have marked as retired. These can be renewed at any time if required.
- **Historical Competencies -** This tab will list all previous version of competencies which have been renewed.

SWAP | View PRA and Permit forms

Technicians can access previously submitted Pre-Start Risk Assessments (PRA) and Permits for open work orders via the SWAP application.

Technicians will no longer need to contact their Vendor Administrator or Facilities Manager to gain access to a PRA or Permit they have submitted.

How it works:
Just simply enter the work order from within the mobile application and from the work order detail screen, scroll down to access the hyperlinks to each of the submitted forms.

Selecting any of the underlined PRAs or Permits within a PRA Group will load a PDF of that specific form.

Note: Once a work order is closed out, it will still disappear from your SWAP application. If you require access to a PRA and / or Permit for a completed work order, please contact the site Facilities Manager.

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SWAP | Work Order Closures

Technicians are required to close out any active work order assigned to them via the SWAP app. Individual closures for Reactive and Preventative maintenance jobs can only be conducted via the application and not through the portal.

How it works:
To complete a work order, complete the 'Additional Findings' close out screen. Select '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 and details. Also, you can upload up to 5 photos of any documentation or of site if required.

Tech submits a PRA	→	Tech conducts actual work	→	Tech closes out the job via the app

Retrospective Closures:
Technicians who are experiencing issues with the SWAP app whilst onsite (i.e. Network connection is slow) are able to close out work orders retrospectively once they got back to an area with good reception. To do this, tech would have to adjust the Actual Rectification Date and Time on from the closure page by clicking on the 'Edit' button. Rectification date and time must be after the Reported/Onsite date & time.

Note: If additional works are required, detail what work/hazard has been identified under 'Description'. Do not just say 'yes'. An email is sent to the CXC with your description to raise a work order, so we require as much detail as possible to be noted down when these fields are selected.
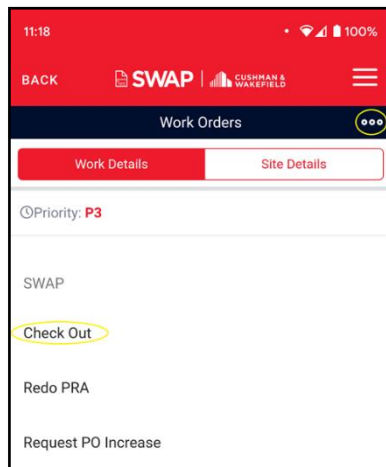
SWAP | Check Out

The Application Support Team has optimised the Check In / Out feature to simplify the process of checking 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.

How it works:
Technicians 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.

SWAP | Asset Condition Rating

For certain types of work orders, technician users may be prompted to complete an asset capture form via the SWAP app.

Work orders which have an asset attached to them will have their asset details outlined in the SWAP application. They are visible via the Work Order Summary screen

How it works:
- To review assets from the work details screen you would need to click on the little information ⓘ icon from the top right corner.
- Once selected, you will be presented with the Parent Asset details screen.
- Then click on the No. of Child Assets option from the bottom of the page. Child Asset screen should appear.
- Enter all child assets and rate each one of them according to their condition then hit submit.
- You can also opt to tick 'No Change Required' if a particular child asset doesn't require a review.
- Once done you should then be able to proceed and complete the job.

Must Know:

Child Asset Filter
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.

"No Change Required" option
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 will be able to go ahead and review all relevant assets.