Contractor Engineer vxMaintain Guide

(DRAFT)

November 2020 – Version 1.01

QUALITY OF LIFE SERVICES

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VERSION CONTROL					
Version	**Issue date**	**Description**	**Prepared by**	**Checked by**	**Authorised by**
1.01	Nov 2020	First draft of guide	A Masson	A Law	

Note: This manual will be updated on a regular basis. Therefore, we recommend to only keep a digital electronic copy and request the updated version periodically.

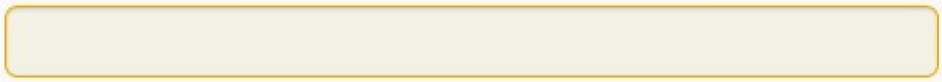
Guide Navigational Tips

This guide is set out in a logical manner but should you get lost then return to the “Table of Contents” to find what you are looking for. The use of engineer access to vxMaintain via an interface is not covered.

The screenshots given are examples only and may not always align with the Live Application.

The following is used as a basis within this guide:

- **BOLD CAPITAL WORDS**: This references a button that you need to click on
- **“Words in Speech Marks”**: This references the Page / Table name
- **Important Information: This is referenced by bold writing within a blue coloured box**
- The screenshots given are examples only and may not always align with the Live Application
- In vxMaintain, fields that are mandatory are coloured in a darker orange outline with a light orange background. See the image below.



This guide sets out the functionality that Verisae Mobile has to offer. Therefore, whilst utilising this guide, you may see functionality and aspects of the System that your role does not allow you access to.

Please always ensure that your tiles are correct and that they show the right data. You are responsible for your own tiles.

It is meant as a guide only and is not an exhaustive system manual. If you have any concerns or questions then please communicate with your Verisae representative.

Introduction

Arriving at a DWP Site

- Please ensure that you follow all rules and guidelines when attending site

Notes

- No work should be carried out without a Work Order number
- Ensure that you understand and mitigate all risks related to any works
- Use the start, pause and complete buttons to record your time on a job
- Log a detailed note to record any specific information you think is relevant to the Work Order

Verisae Mobile

Verisae Mobile is a browser-based application and will work on a mobile device (such as a tablet or smart phone) or a desktop computer / laptop with wireless connectivity.

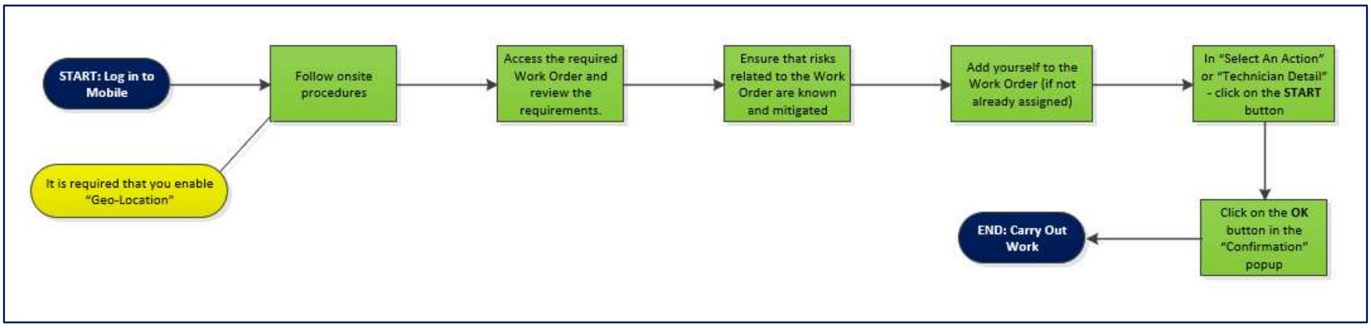
Note: Verisae Mobile only works in Chrome, Firefox, Opera, etc., and Internet Explorer (IE) 9 or higher.

Verisae has implemented restrictions if you attempt to login to Mobile using IE6, IE7, or IE8. If the application detects that you are trying to login to Mobile from IE6, IE7, or IE8, a screen is presented with an error notification explaining that the browser is not supported and that you may not login. The login box is not shown.

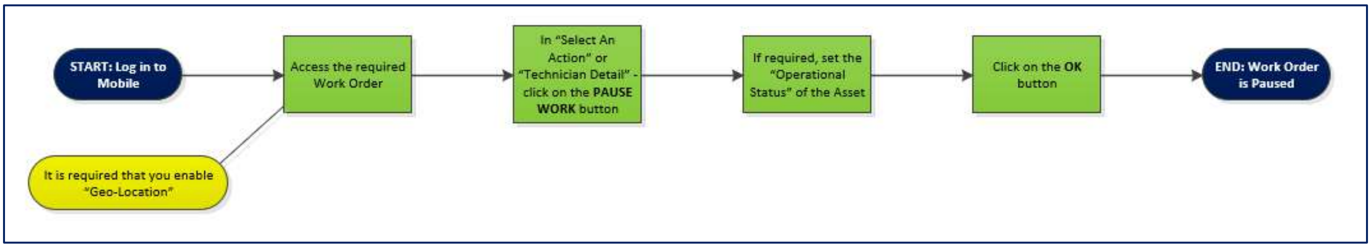
The following process maps have been added to enable you to have a quick, high level overview of functionality. To then view further information, please review the relevant detailed section within this guide. The maps do not show every possible process but rather an “idea” of the process required. Please review the more detailed sections for additional information.

Quick Access Process Maps (High Level)

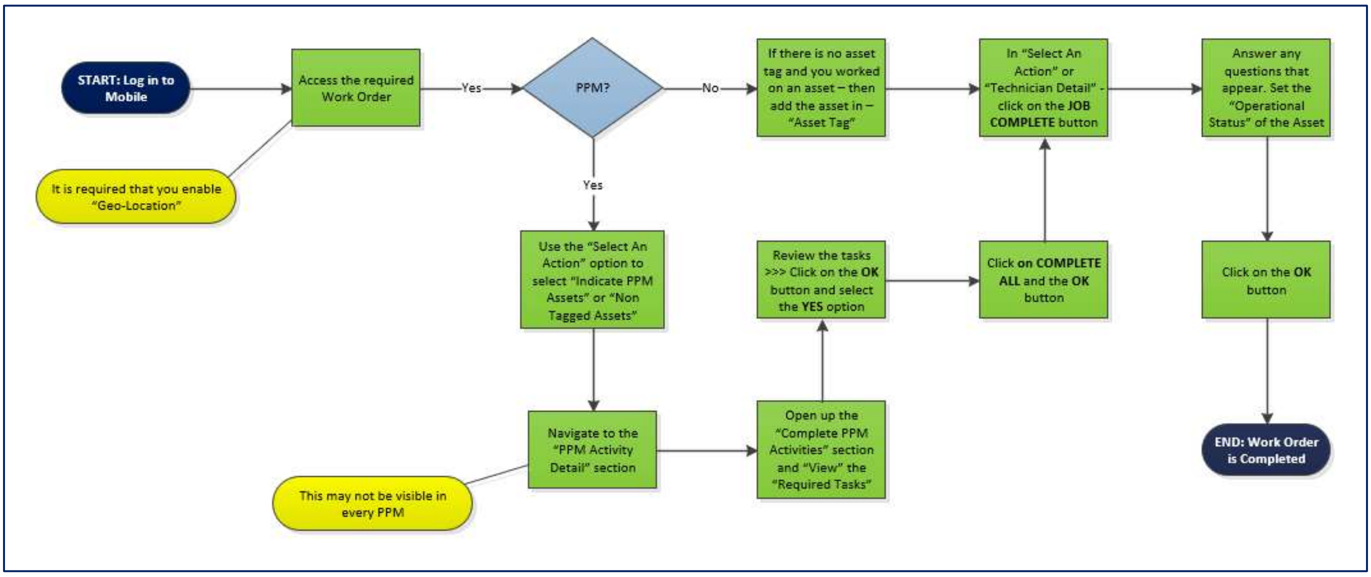
Contractor Engineer Start Work Order



Contractor Engineer Pause Work Order



Contractor Engineer Complete Work Order



Login Page

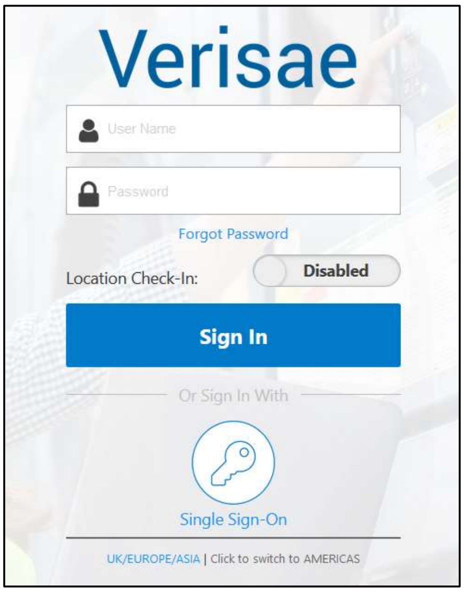
Access through Mobile URL

You can access the Mobile site directly by typing http://mobile.verisae.co.uk in to your browser. This will take you to the Verisae login page where you will be able to enter in your login details to access the site.

NOTE:

- **Before logging in, add the URL to your browser bookmarks / favourites.**
- **Ensure that pop-up's are allowed.**
- **All orange fields within the Application are mandatory fields and therefore need to be completed.**
- **It is a requirement to enable "Geolocation".**

Login with your username and password - which are case sensitive. If you have forgotten your login details, then please contact your office administrator to reset your Verisae login. Alternatively, click on the **FORGOTTEN PASSWORD** link which will only work if you have an email address defined in your Verisae profile.



When logging into Mobile with "Geolocation" enabled (the default is "disabled"), a "Confirm Site" popup will appear to ask you if you are at the nearest site where GPS has placed you. If you are, click on the **CONFIRM** button which will take you to the dashboard page and show tile counts based on the site that you are at. If not, click on the **CHANGE SITE** button to select an alternate site, or you can click on the **UNFILTERED** button to show all counts on the tiles.

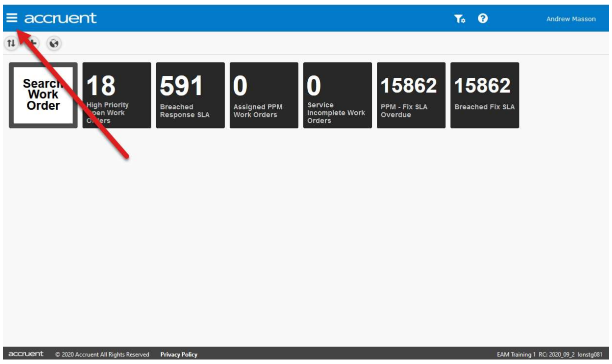
Mobile Screen Layout

The main homepage, or dashboard, of the Mobile application contains a field of tiles that displays a range of defined information. These tiles can be of various uses and types and can be configured specifically for your role.

The top two corners of the screen have different buttons which do various things. Once clicked you will be presented with further options. We will go in to these buttons in a little more detail within the next section.

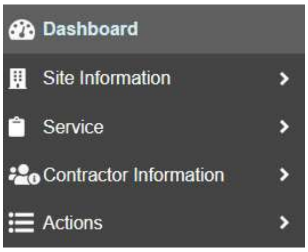
Navigation Button

The “Navigation” button is the top left button. Selecting this button generates a fly-in menu from the left side of the screen. Options in this menu help you to navigate within the Mobile application.



The following is a high level description of the different button selections:

BUTTON	DESCRIPTION
Dashboard	Closes the menu and takes you back to the main page.
Site Information	This will allow you to click on and access the “Site List”, “Site Documents” and “PPM Schedules.
Service	Opens a further option underneath, namely: “Outstanding Work Orders”
Contractor Summary	Enables an overview of Work Orders
Actions	There are various options within this section that allows you to scan an asset tag, define filters, change location and so on.



NOTE: Your role may not give you access to all of these functions.

Service Section

Depending on your role configuration, you will have various features enabled in this section.

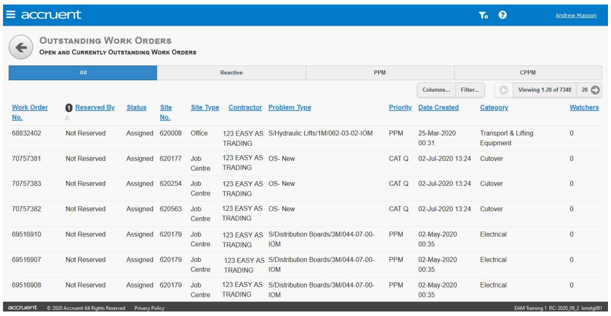
Outstanding Work Orders Table

Navigation: Service >>> Outstanding Work Orders

This table will open and show all Work Orders that are currently open and outstanding for all sites (or selected sites if using a filter). There are 4 tabs along the top and these are called:

- All
- Reactive
- PPM
- CPPM

You are able to click any of these tabs to have the list of Work Orders filtered to this Work Order type.



Useful functions on this page are:

- **Columns:** Click on the **COLUMNS** button for a list to open that you can then deselect columns that you do not want to see (or reselect to see them). The system will remember your selection for future logins.
- **Filter:** You can further define the results on this table by clicking on this button and seeing a search type window.
- **Export:** On the bottom of the table is an **EXPORT** button that will allow you to export the results of the table. Formats are: Excel Document; Tab Delimited and Comma Delimited.

You are able to select a Work Order from the table which will then take you to the “Work Order Summary” page where, depending on the status and your role configuration, you will be able to carry out a number of actions. These actions are described at a high level in the table below.

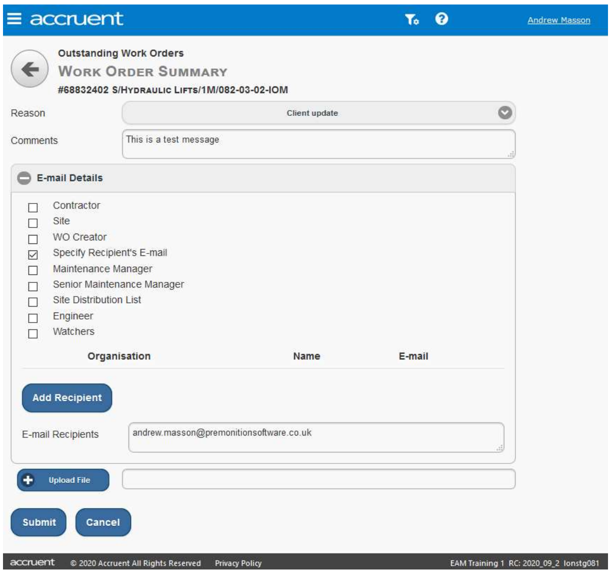
Select An Action…

OPTION	DESCRIPTION
Accept / Decline Work	If the Work Order is in a status of “Pend Accept”, this option will enable you to either **ACCEPT** or **DECLINE** the work. If you are declining you will need to add a reason as well as add mandatory comments. If you are accepting the Work Order, you will need to add an ETA and also mandatory comments. Accepting the Work Order will put it in to a status of “Assigned”.
Add Engineer	A droplist field of names will appear whereby you will need to click on the required person and click on the **SAVE** button. The page will refresh back to the “Work Order Summary” page. This adds additional engineers to the Work Order. Everyone who works on a Work Order should be added.
Allocate To Me	If an engineer clicks on a Work Order that is not yet reserved or assigned to them, this option will be available. Performing this action will then allocate (reserve) the Work Order to the signed in engineer.
Add Parts	Whilst working on the job, you may have used some parts. Clicking on this option will allow you to add predefined parts that have been assigned to your company. This may not be used for your company.
Edit Asset	You are able to amend the asset category or change the asset that was assigned to this Work Order by clicking on this option.
Edit Parts	If you have added any parts to this Work Order, you are able to edit the quantity by clicking on this button.

Indicate Non Tagged Assets	This is shown on PPM Work Orders. A popup will appear called “Indicate Non Tagged Assets” where you will need to enter in a numerical value of the number of assets that you worked on. Then click on the **SAVE** button.
Indicate PPM Assets	This is shown on PPM Work Orders. A popup will appear called “Indicate PPM Assets” where you will need to review the list of assets and add a tick against any assets that you worked on as part of the PPM. Use the **FILTER** button to filter the results to be more definitive. Click on the **SUBMIT** button to add all the ticks. You cannot go through different pages and then add all together – make sure that you click on the **SUBMIT** button per page that you go through.
Job Complete	Click on the **JOB COMPLETE** button if you have completed the Work Order. Once you click this button, complete all the fields in the popup and then click on the **SAVE** button.
Log Note	Add in the “Reason” and the “Comments” field and then click on the **SUBMIT** button. If you want to email a specific person then click on the “E-Mail Details” section. You are also able to upload files. See the section below for further information.
Pause Work	If you need to pause the Work Order then use this option. Click on the **PAUSE WORK** option. Populate the mandatory fields before you can click on the **SAVE** button.
Start Work	If you are ready to begin work, then click on this option. A popup will appear asking for confirmation. Click on the **OK** button if you are ready (or the **CANCEL** button if not). You may receive a popup letting you know if you are deemed to be off-site. If you click on the **SAVE** button then the next popup will inform you how far away from the site you are. It is very important that you only start work when you are onsite.
Update ETA	Populate the date and time chooser and then add in some comments before clicking on the **OK** button.

Log Note

The “Log Note” functionality is a powerful tool and can be used for a multitude of reasons. The main one will be to update someone on the status of a Work Order. Notes added can be seen by anyone who has access to the history of the Work Order and cannot be edited or removed once submitted. However, logging a note does not notify anyone that a note has been added. If you do need to update someone that a note has been added, then once you have filled in the “Reason” and “Comments” fields, click on the “E-mail Details” section. A recommended process for notifying someone is below.



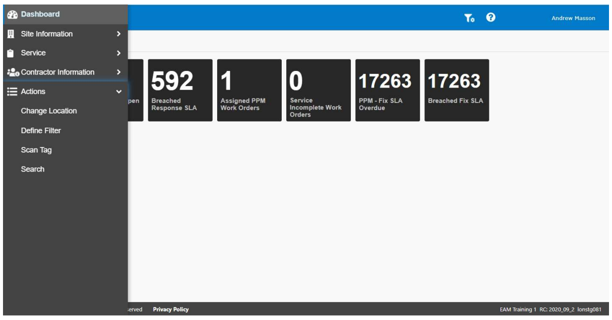
STEPS:

☐ Populate the “Reason” field.
☐ Add in free text comments.
☐ Click on the “E-mail Details” section.
☐ Add a tick in to the “Specify Recipient’s E-mail” box.
☐ Add free text email addresses. If there are multiple then separate this by a comma.
☐ If you need to upload a file, then click on the **UPLOAD FILE** button and navigate to where the file is located.
☐ Click on the **SUBMIT** button.
☐ An email will be sent to the recipient/s and a history event will be added to the Work Order.

NOTE: You can add email addresses by clicking on the ADD RECIPIENT button. However, if a user has not added an email address to their profile then their name will not be selectable. You are able to search through the names in this list – use the FILTER button.

Actions Button

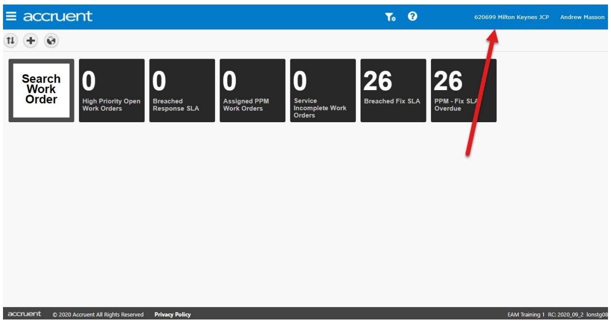
Depending on your role configuration, you will have various features enabled in this section. Selecting this button generates a further sub-menu. Options in this menu help you to perform various tasks, such as filtering the dashboard to certain categories or locations, adding assets and so on.



BUTTON	DESCRIPTION
Change Location	Allows you to select a specific site so that displayed tiles show information relevant to that site.
Define Filter	Where you will come in order to define new filters to choose from.
Scan Tag	On a desktop PC, will open your computer explorer window so that you can choose a vxMaintain barcode saved on your PC. If you are on a Mobile device, it should allow you to scan the vxMaintain asset and then show details about that asset.
Search	The ability to search for information throughout the application.

Change Location

If you would like to see the dashboard tiles display numbers for a different site, then select the **CHANGE LOCATION** button. A window then displays a list of locations and allows you to select a site to apply to the dashboard. The tiles will then display their information for that specific site and will also show which site you have selected.



Define Filter

This button allows you to create or edit a filter. Select the **DEFINE FILTER** button. This will open a pop-up box as shown in the below example:

The fields are as follows (but populate only what you need to):

- **Filter Name:** Free text field for defining the name of the Filter
- **Existing Criteria:** Only shows if a filter has been preselected and lists out your previously selected criteria.
- **Client:** Click this to set the client for whom you are creating the tile for. Ensure that you select “DWP”.
- **Organisations:** This allows you to set the filter to display certain sites. If you select the “Select All” option under one of the headings then you will not be able to select any other areas.
- **Contractor:** There are options for “External” or “Internal”. However, you will need to select and open the “External” option and then click the box next to your company name.
- **Categories:** Selecting this will allow you to select one or more Categories to assign your filter to – it is actually more a filter for Subcategory but use the “Select All” option under a Category should you want everything within that Category.

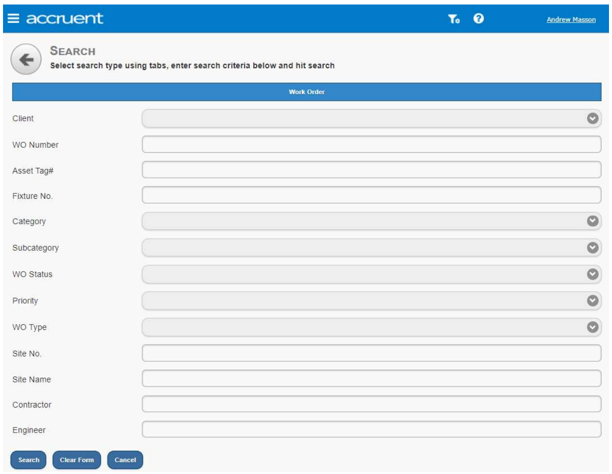
You may see a number of buttons along the bottom bar:

- **SAVE:** Make amendments to the existing filter and save it along with the amendments. To edit a filter you first need to ensure that it is selected in the **CHOOSE FILTER** button.
- **SAVE AS:** If you select **SAVE AS** then you will be prompted to change the name of the filter. A good path if you are creating multiple filters with small tweaks to what is being shown.
- **MAKE DEFAULT:** Use this option if you would also like to make this filter the default option for when you log in.
- **CANCEL:** Closes the popup box with no amendments.

NOTE: If you want to edit an existing filter, then first choose the filter using the “Choose Filter” option and then open the “Define Filter” option.

Search

If you need to search for information within the whole application, then click on the **SEARCH** button. This will open up a page similar to the below where you have multiple Work Order criteria that you can choose to search for.



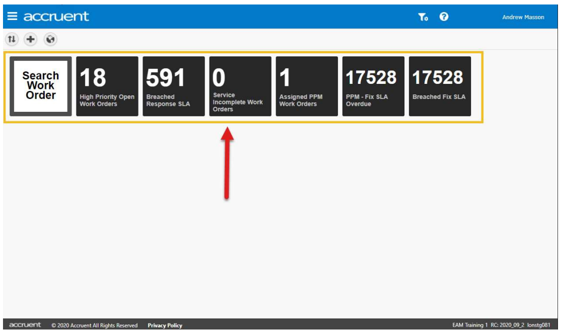
Populate the required fields and then scroll down to the bottom of the page and click on the **SEARCH** button.

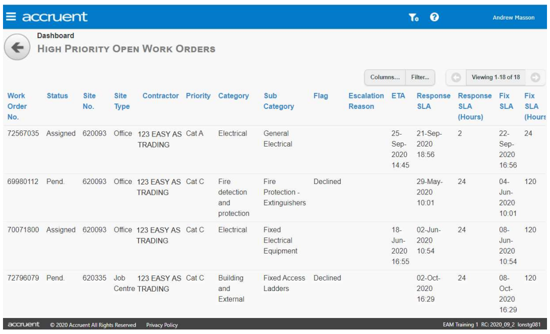
If you would like to start your search over again, then click on the **CLEAR FORM** button to start afresh.

Work Order Process

Starting / Pausing / Completing a Work Order

There are various ways to navigate to a Work Order but the quickest is through an applicable tile on the “Dashboard” – see the below screenshot. Once you have clicked on the applicable tile, the relevant table will open and you will select a Work Order. This will cause the “Work Order Summary” screen to open.

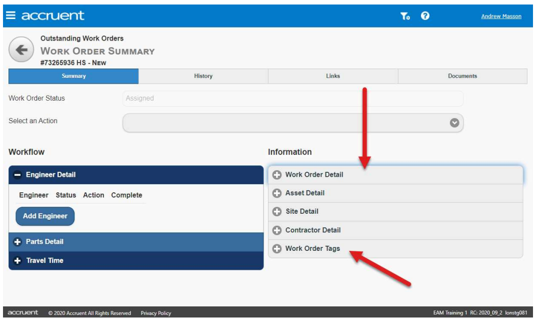




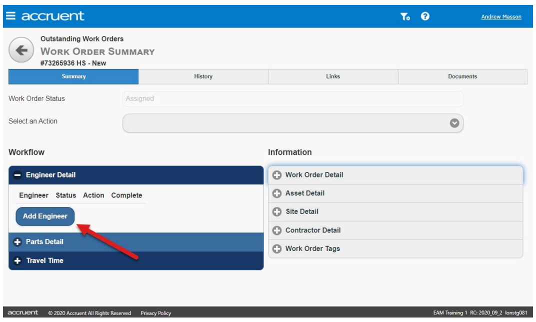
The following are the “general” steps that will need to be taken to “Start / Pause or Complete” a Work Order. There will be other processes involved but, as always, follow the Business process that applies at any point. The below steps assume that the Work Order is already accepted but if not then you (or your Administrator) will need to accept the Work Order and also add an ETA. The risks process pertaining to the Work Order is outside of vxMaintain and should be followed in all cases.

Steps - Reactive:

1. Review the details by opening the “Work Order Detail” section.
2. Review the details within the “Asset Detail” section, if applicable, and also any “Work Order Tags”.



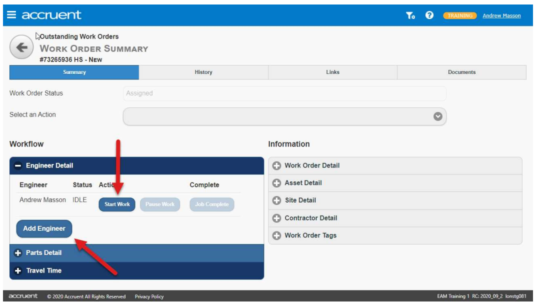
3. Review the tabs along the top of the screen:
    a. **Summary**: The default tab and where all the details of the Work Order are.
    b. **History**: A very basic version of the history of the Work Order.
    c. **Links**: Information on whether any other Work Orders are linked to this one.
    d. **Documents**: Shows any documents linked to this Work Order. You are able to upload files too.
4. The section entitled “Engineer Detail” (under the “Summary” tab) will now be highlighted in blue and will need to be completed before you can proceed. Click on the button and select your Name / Company Name.



5. Click on the **START WORK** button. However, if there are additional engineers, then click on the **ADD ENGINEER** button. The “Add Engineer” popup box will appear with a droplist “Engineer” section. Use this section to select an engineer and click on the **SAVE** button. The page will refresh back to the “Work Order Summary” page and the additional engineer will be present. You will need to click the **START WORK** button for any additional engineers (ensure that they are well versed in the risks assigned to the Work Order). Once

you click on the **START WORK** button a confirmation popup will appear and you will need to click on the **OK** button. Once you click on the **OK** button, the page will refresh back to the “Work Order Summary” page and the **START WORK** button will now be greyed out for the selected Engineer.

NOTE: If you receive a popup saying that you are off-site – you have not enabled geolocation or you are not onsite. You should completely log out of the system and login again with geolocation set to enabled. Always ensure that you are at site when carrying out actions.



6. If you are on a shared PC, please ensure that you now log out and proceed to carry out works. If you are on your own device, then you can lock the device and continue with the required works.

NOTE: Ensure that all risks are considered when carrying out works.

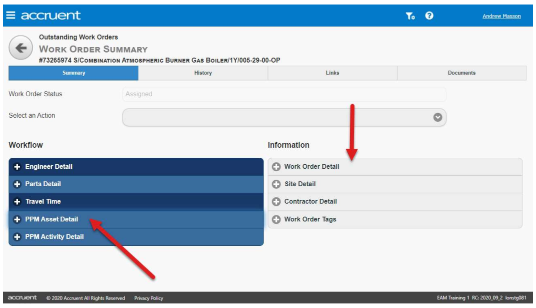
NOTE: Do not start and stop the Work Order in one process. Ensure that you start work >>> carry out works >>> then follow the pause / complete process as required.

7. When you have completed the required work, access Verisae Mobile and navigate back to the “Work Order Summary” of the Work Order. You will now need to either “Pause” or “Job Complete”.
    a. **Pause**: Click on the **PAUSE WORK** button. The “Pause Work Order” popup will appear and all fields will need to be completed. Populate the following fields before clicking on the **SAVE** button and putting the Work Order in to a “Service Incomplete” status.
        i. **Pause Reason**: Droplist selection of reasons
        ii. **Operational Status**: This is the operational status of the asset and shows if there is an asset associated to the Work Order.
        iii. **Pause Comments**: Comments as to why you are pausing the Work Order
    b. **Job Complete**: Click on the **JOB COMPLETE** button.
        i. The “Job Complete” popup will appear and all fields will need to be completed. Populate the following fields before clicking on the **SAVE** button and putting the Work Order in to a “Service Complete” status.
            1. **Operational Status:** This is the operational status of the asset and will only show if an asset has been associated to the Work Order.
            2. **Operational Status Comments:** This is an optional field but relates to the status of the asset. If the status was “Not Working” then this is a mandatory field. This field will only show if an asset has been associated to the Work Order.
            3. **Misuse / Abuse:** Defaults to “No” but use the slider if you need to make it “Yes”
            4. **Asset Tag:** It is important to add the asset that was worked on as part of the Work Order. Use the **SEARCH** button to aid in this.
            5. **Fault:** Add in the fault code from the droplist.
            6. **Action:** Add in the action code from the droplist.
            7. **Cause:** Add in the cause from the droplist.
            8. **Complete Comments:** Add full description of works undertaken.
8. Click on the **SAVE** button and the page will refresh back to the Work Order summary. The Work Order will move in to a status of “Service Complete”.

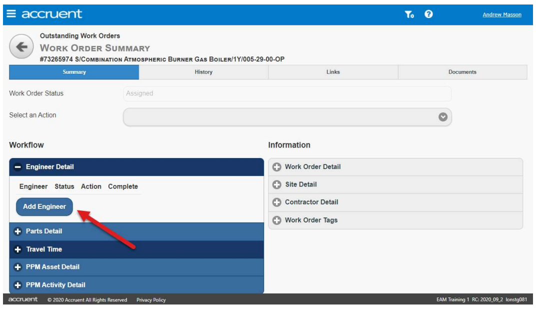
NOTE: If you receive a popup saying that you are off-site – you have not enabled geolocation. You should completely log out of the system and login again with geolocation set to enabled OR ensure that this is done for future Work Orders.

Steps - PPM:

1. Review the details by opening the “Work Order Detail” section.
2. Review the details of the assigned asset (if populated) by clicking on the “PPM Asset Detail” section.
3. The Work Order will be in a status of “Assigned”.

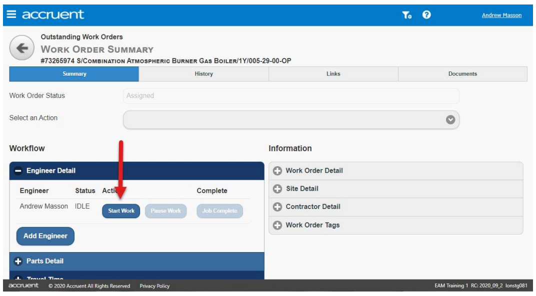


4. The section entitled “Engineer Detail” (under the “Summary” tab) will now be highlighted in blue and will need to be completed before you can proceed. Click on the button and select your Name / Company Name.



5. Click on the **START WORK** button. However, if there are additional engineers, then click on the **ADD ENGINEER** button. The “Add Engineer” popup box will appear with a droplist “Engineer” section. Use this section to select an engineer and click on the **SAVE** button. The page will refresh back to the “Work Order Summary” page and the additional engineer will be present. You will need to click the **START WORK** button for any additional engineers (ensure that they are well versed in the risks assigned to the Work Order). Once you click on the **START WORK** button a confirmation popup will appear and you will need to click on the **OK** button. Once you click on the **OK** button, the page will refresh back to the “Work Order Summary” page and the **START WORK** button will now be greyed out for the selected Engineer.

NOTE: If you receive a popup saying that you are off-site – you have not enabled geolocation or you are not onsite. You should completely log out of the system and login again with geolocation set to enabled. Always ensure that you are at site when carrying out actions.



6. If you are on a shared PC, please ensure that you now log out and proceed to carry out works. If you are on your own device, then you can lock the device and continue with the required works.

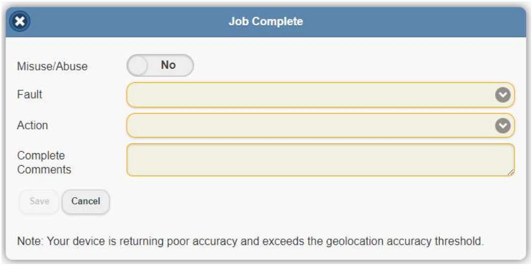
NOTE: Ensure that all risks are considered when carrying out works.

NOTE: Do not start and stop the Work Order in one process. Ensure that you start work >>> carry out works >>> then follow the pause / complete process as required.

7. When you have completed the required work, access Verisae Mobile and navigate back to the “Work Order Summary” of the Work Order. You will now need to either “Pause” or “Job Complete”.

a. **Pause**: Click on the **PAUSE WORK** button. The “Pause Work Order” popup will appear and all fields will need to be completed. Populate the following fields before clicking on the **SAVE** button and putting the Work Order in to a “Service Incomplete” status.
   i. **Pause Reason**: Droplist selection of reasons
   ii. **Pause Comments**: Comments as to why you are pausing the Work Order

b. **Job Complete**: Ensure that the asset details assigned to the PPM are correct. If this is not the case then please add relevant comments to the “Complete Comments” section below. It is extremely important to know which assets were worked on as part of the PPM.
   i. The “Job Complete” popup will appear and all fields will need to be completed. Populate the following fields before clicking on the **SAVE** button and putting the Work Order in to a “Service Complete” status.
      1. **Misuse / Abuse:** Defaults to “No” but use the slider if you need to make it “Yes”.
      2. **Fault:** Add in the fault code from the droplist.
      3. **Action:** Add in the action code from the droplist.
      4. **Complete Comments:** Add full description of works undertaken.



8. Click on the **SAVE** button and the page will refresh back to the Work Order summary. The Work Order will move in to a status of “Service Complete”.

NOTE: If you receive a popup saying that you are off-site – you have not enabled geolocation. You should completely log out of the system and login again with geolocation set to enabled OR ensure that this is done for future Work Orders.

Dashboard Sub-Menu

Tile Sort Order

The tiles on the Dashboard are able to be sorted according to a defined set of rules. To access this functionality, click on the button shown in the screenshot below.

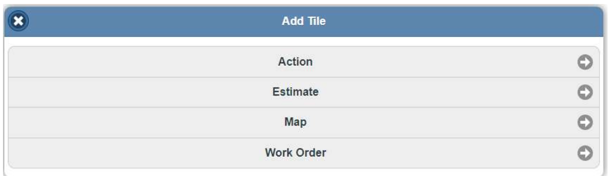
If you click on the button, a pop-up menu will appear (the current sorting selection will be highlighted in blue) and this will have a list of alternate sort orders that you can select. These options are as follows:

- **All Tiles (By Colour):** Will display all tiles in the order of the RAG colour >>> Order is red, amber, green and then not RAG enabled tiles
- **All Tiles (By Order):** Will display all tiles in the order defined when the tile was setup
- **All Tiles (By Load):** Will display all tiles on the dashboard in the order that they load on the page
- **Amber and Higher:** Will only display RAG enabled tiles that are currently in a "red" or "amber" status
- **Red:** Will only display RAG enabled tiles that are currently in a "red" status

Adding Tiles

As part of your role you are able to add a Work Order tile – this is achieved by clicking on the plus icon as highlighted below.

By clicking on this button, a pop-up will open that will show a table with various options available (depending on your role configuration). Click on the relevant button to then open further options.

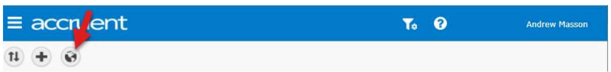


Adding (editing) tiles is a complex exercise and you should always check that the results within a tile are the same as what is shown in the Workspace Application, so please do liaise with your office Verisae administrator to ensure that what you are doing is accurate.

NOTE: Any tiles added by you and the accuracy therein will become your responsibility.

Map

You are able to create a map tile which will show you a map of which site relevant Work Orders are located. Any tile that you have created will be selectable within the map.



Choose Filter

To see what filter is currently applied or to select a filter that has been created, click on the filter icon (which is highlighted within the next screenshot).

The **UNFILTERED** button on the bottom of the pop-up clears any filters that were chosen and sends the dashboard back to the default, unfiltered mode without any restrictions.

User Preferences

If you want to set or amend your system preferences then select the **USER PREFERENCES** button which is accessed by clicking on your name on the top right of the screen.

Depending on your settings, this will determine what you can and cannot edit on this page. However, most fields are editable on this page. It is recommended that you add an email address to your profile so that the "Forgotten Password" option will work correctly on the login page.

Dashboard Order Setting

One setting that defaults to blank is the "Dashboard Order Setting". This defines the sort order of the tiles on the main Dashboard screen. Once you have finished your editing, click on the **SAVE** button to be taken back to the main page. It is recommended that you use the "All Tiles (By Order)" option as the default.

Work Order History Order

The default setting for Work Order history is to show the oldest events at the top of the page and the newest events at the bottom. This is now configurable and if you would prefer to show the newest event at the top of the page, then select the "Newest to Oldest" option and click on the **SAVE** button.

Password Rules

The password criteria for all Mobile roles is as follows:

- Must contain at least one number and one letter
- The user will be required to change the password on the initial login
- After 10 attempts the account will be locked out for 30 minutes
- Must contain at least one uppercase and one lowercase letter
- If the user has not logged in for 45 days then the account will be made inactive
- Minimum character length of 8
- The password will need to be changed every 50 days

Logout

In order to log out of the application, click on your name on the top right of the screen and then click on the **LOGOUT** button. You will then be logged out and taken to the Login page.

Support

FAQs

- **Can I update the system if I have no internet / wifi signal?**
  - You will need to call a person who has Contractor Admin access to vxMaintain so that they can remotely start the Work Order on your behalf.

- **What if an asset I'm servicing isn't within the list in my work order?**
  - Follow the predefined asset change process.

- **Who do I contact if I have an issue / need support?**
  - Contact your head office and then your Sodexo Supply Chain Manager.