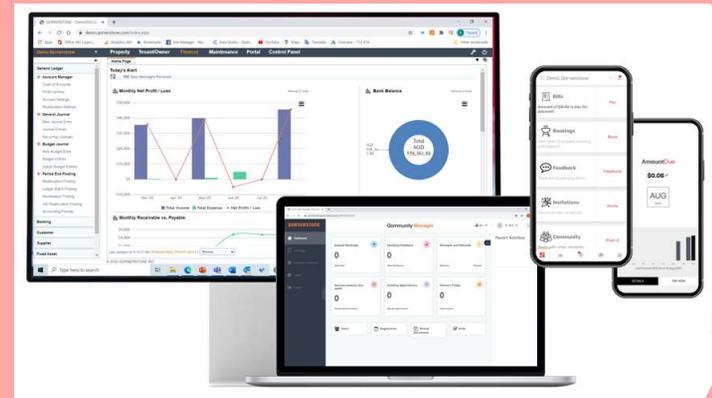QORNERSTONE

Qornerstone Estate Platform

Raising a Work Order

Version 1.3

Agenda

The guide is for creation a new work orderˆ in Qornerstone Estate (QE) Maintenance Module. The purpose of a work order can be used for ad-hoc maintenance/repair arising from resident feedback and preventive maintenance. The Guide will contain

1. Creation of a New Work order

2. Input work details , choose the work type/problem codes & others.

3. Assign personnel/supplier .

4. Optional : Tagged a Asset Code & Upload Documents (Quotation, Documentation)

5. Appendix: Creation of a eFams Account for the Contractor

Workflow 1. Creation of Work Order

Workflow description:

- Scenario :During scheduled maintenance, technician/supplier informs that some parts need to be replaced, which requires issuing a new Purchase Order (PO).
- User can either create a Work Order (WO) to input the work costing & raise a PO.

Next steps for site staff:

- Go to Maintenance Module –> Maintenance Work -> Select New Work Order
- Create a new WO for the PO (this will be discussed in another guide) .

Workflow 2.
Input Work Details

Go to Tab 1 – Input the work details:

Steps:

- Update the necessary details **(note : TEXT Boxes in Highlighted in Black are Mandatory Field)**

1) Requestor (Inputter has the option to choose from the list of user , tenants or input under free text. *

2) Fault Location (free text)

3) Problem Codes (obtained from the work type)

4) Problem Description (Free Text)

5) Work Source /Work Priority

*** Note the work order can be raised via Efams app and updated by the site staff and/or condo manager who have access to the Qornerstone Estate (QE)**

Workflow 3.
Input Personnel Details

Go to Tab 2– Input the Personnel's details:

Steps:

- The list of Personnel will be auto populated in the personnel details as this has been set-up in Property Master (Maintenance-Module -> Maintenance Property - > Property Master) .

- Check on the box for Email address and Push Notification to alert the personnel assigned to the wo.

- In this tab, requester can remove personnel from the work order by checking the box and click on delete

- In addition the requestor can change the personnel rank (Primary, Secondary, Tertiary and etc)

Note:

- For Notification via the mobile number has been disabled)

- *For Notification via Email , the has to be set up in the Alert Table*

Workflow 4.
Input Supplier
Details (optional)

Go to Tab 2– Input the Supplier 's details.

Notes:

- The details of the Supplier (Term Contractor) will be auto populated if this has been set up in Suppler contract-up and the work types has already been assigned to the contractor.

- Alternatively , the user can select from the drop list to chose the supplier

- There is no need to check on the push notification unless the user wishes to immediately to assign to the supplier.

- Please refer to the Appendix for creation of Efams account for Supplier.

Workflow 5.
Input Asset Details (optional)

Go to Tab 5– Input the Asset Details

Steps:

- Click on the Asset Code and Click Select
- A pop up panel will appear and user can select the asset
- Click on Add item

(Note : this is optional

- *if there is no asset required*
- *Details can be populated when the user is updating the status.*
- *To track the work costing history for the asset.*

Workflow 6.
Upload Documents (optional)

Go to Tab 5– Upload Document

Steps:

- The File Size should not be more than 5 GB and support Word , TXT, PDF , JPG and Excel File format
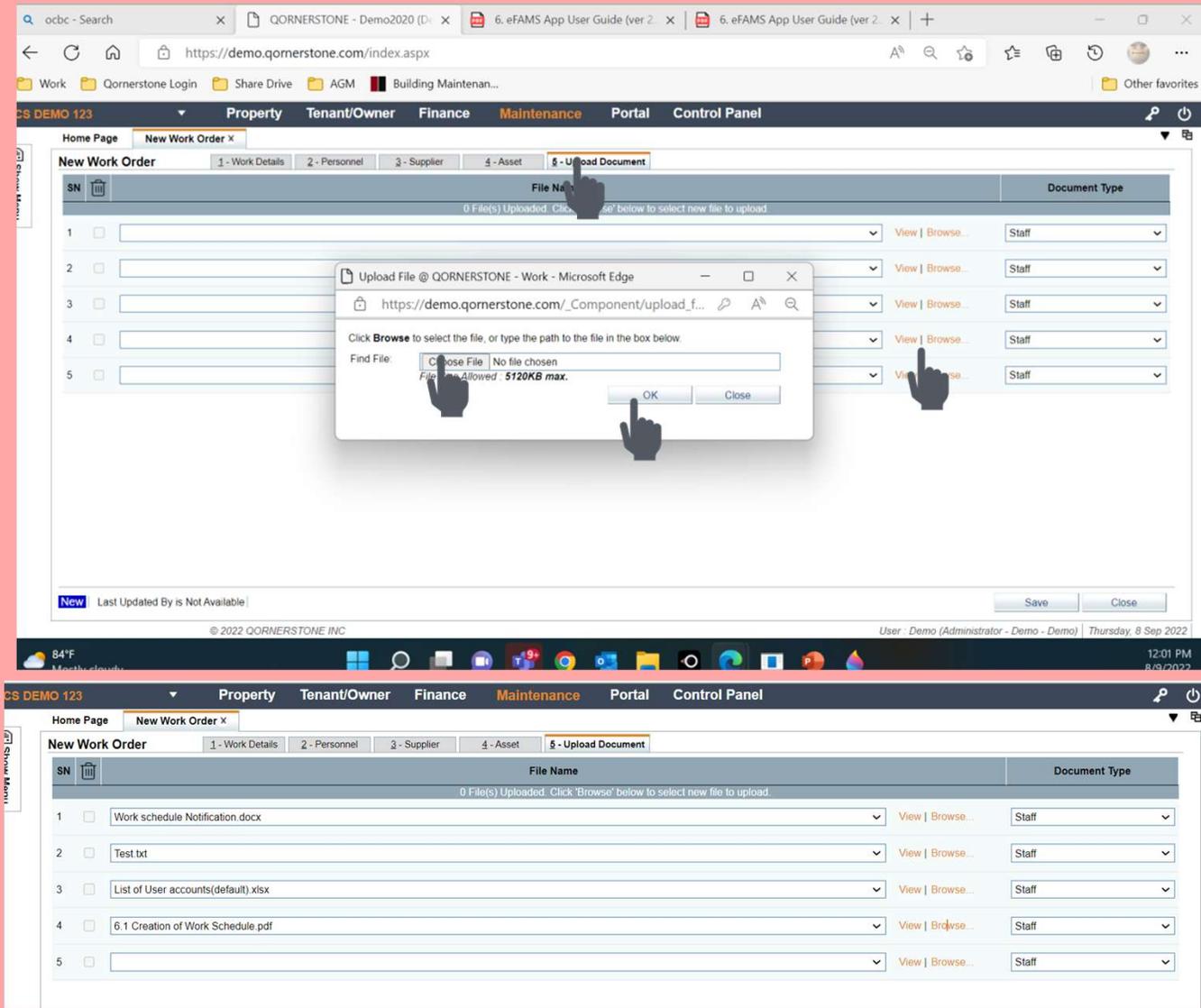
Workflow6.
Save Work Order

- Click on Save .
- A pop up box will appear and user can click on OK
- The Work order is created with a Work ID generated.

Workflow 7 Notification via eFams app

- Once user has click on "Save" button in QE, a push notification will appeared in the assigned personnel's eFams app. The work flow will be discussed in another guide

- The technician can proceed to work on the work order .

- Note: Under A , there is a functionality for the technician to activate the contractor , (Please refer to Appendix for Creation of Efams account for supplier)
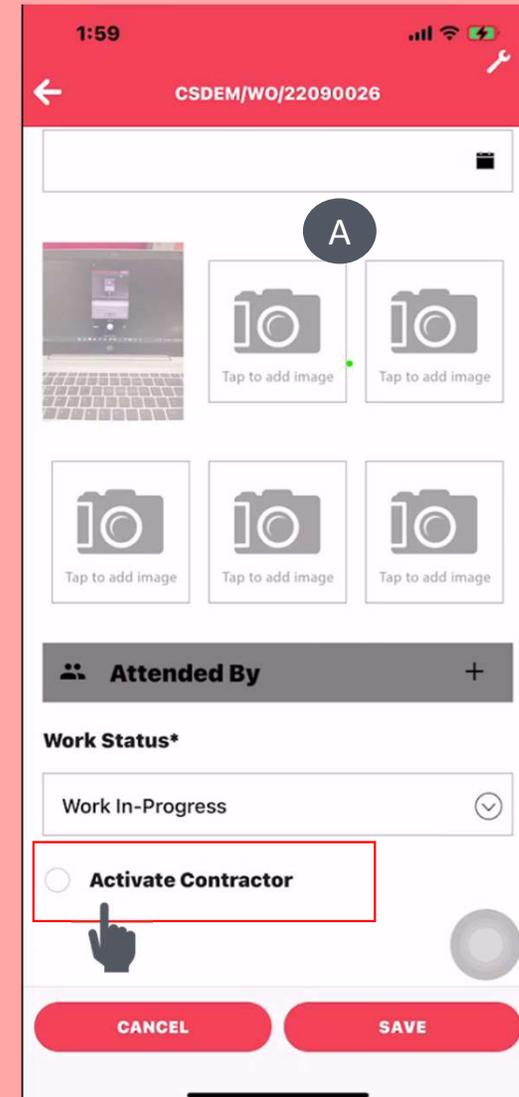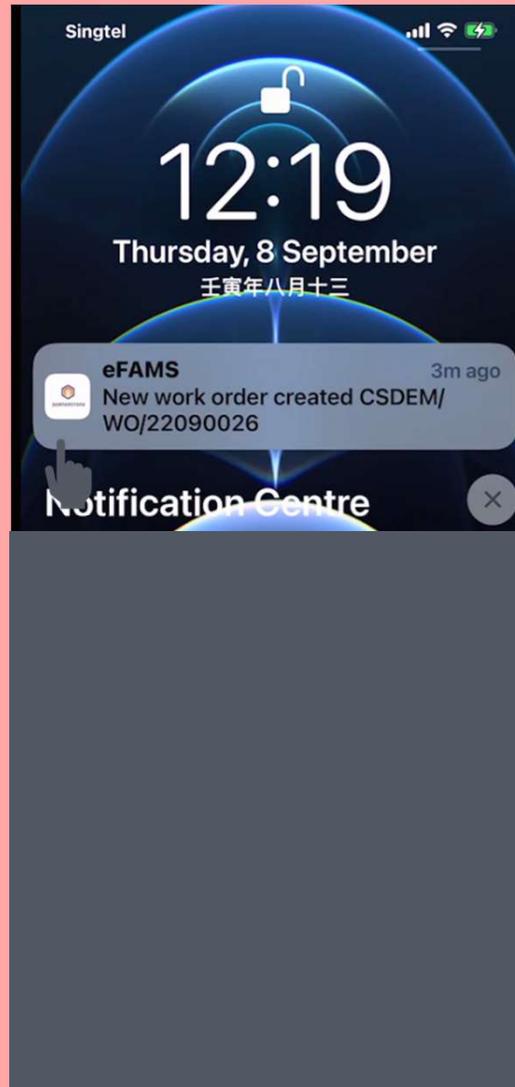
Appendix: Creating a Efams Account for Supplier

- Go to Maintenance -> Maintenance Supplier -> Supplier Contracts. ^
- Select the Supplier
- Click on intended supplier

^*Note: The illustration is done on the assumption that the Supplier Contracts has already be set-up*

- The main page (contract details) of the supplier contract will open

Appendix: Creating a Efams Account for Supplier

- Click on "**Update Contact Details**" to create a efams account for the contractor.

- Go to "**USER ACCOUNT SETTING**" and chose " Select User" . ˄

- A list of user will appear (A)

- Once the intended contractor is selected, a pop up box (B) will be shown . Click on OK

Note: Pre-Condition

a) The contractor's details has to be set up in Control Panel -> User -> New User .

b) The Administrator need to create a new user group without access to QE modules and tag the contractor to it
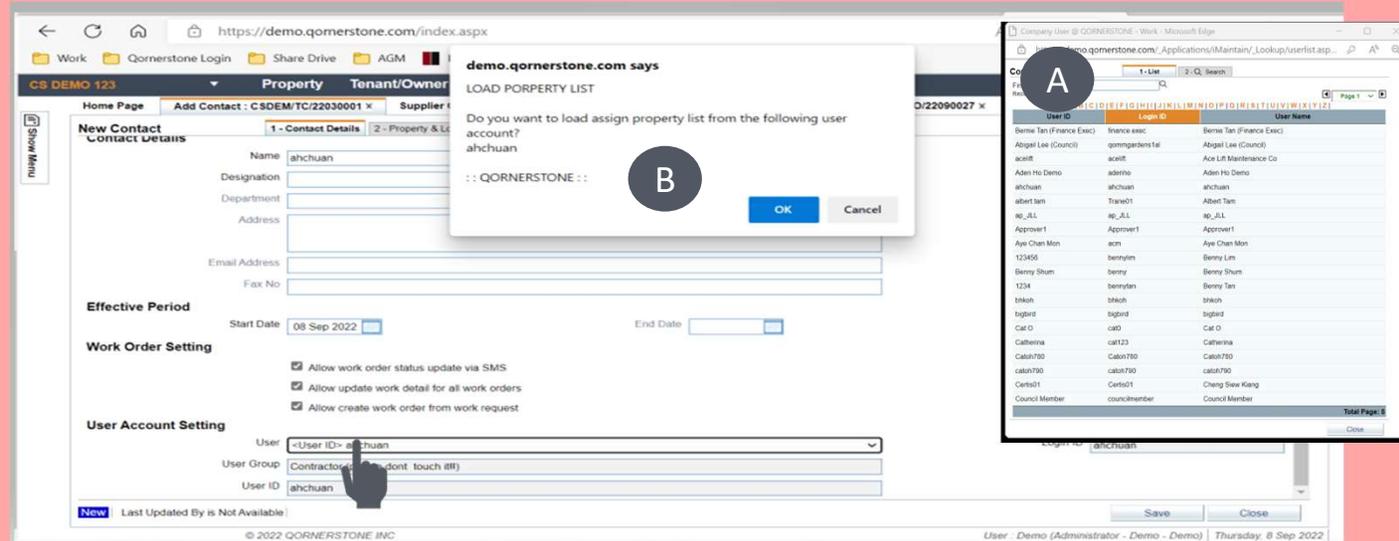
Appendix: Creating a Efams Account for Supplier

- Update the contact details
a) ID
b) Designation (a list of option will shown , Set up under Personnel Designation)
c) NRIC NO (Can Input Dummy)
d) Mobile No (optional)
e) Email Address (Optional)

- Please uncheck the "Allow Work Order status update via SMS" under A
.

Appendix: Creating a Efams Account for Supplier

- Select the work types that is assigned to this contractor^

- Once done, click Save

Note: For any work type that is associated with the contractor, the contractor details will be auto-populated in the supplier details (please refer to Work Flow 4).