

RealMobile Vendor User Guide

VERSION 2

BGIS



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ABOUT THIS GUIDE



Audience

This user guide is intended for new and experienced Vendor RealSuite users who want detailed instructions for using the RealSuite Mobile Application.

It is recommended that all users and particularly those who are first time users read this guide before they begin using the RealSuite Mobile Application.

Related Documents

- RealMobile RealForm FAQ – Vendor
- RealMobile Quick Guide for Vendors

What is RealSuite

RealSuite is a web based integrated enterprise real estate management software suite, supporting all of BGIS' service offerings and enables BGIS to deliver best in class reporting and information management.

RealMobile Application

Our RealHelp mobile platform allows users to review and manage work orders (WO), RealMobile will allow users to view equipment details, job plan information, attach documents and complete/extend work orders.

The RealSuite Mobile Application consists of the following modules:

- Work Order Lookup
- My Inbox
- Forms

REALMOBILE LOG ON

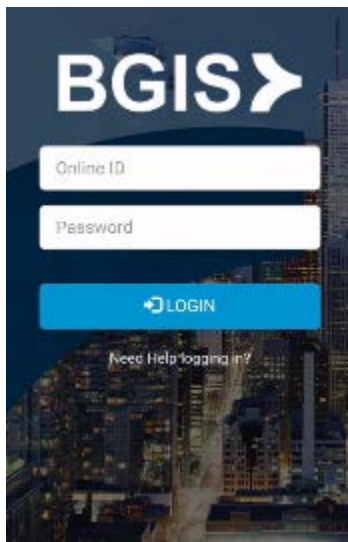
All Work Order RealMobile Access

To access RealSuite on your mobile device, visit <http://rs.bljc.com/real suite> on your mobile browser.

Logging in to RealMobile

To open the RealSuite mobile application, click on the RealSuite icon located on your mobile home screen.

The RealMobile application will launch. Enter in your user name and password.



Need help logging in?


If you cannot remember your password,

Click on “Need Help logging in?” located beneath the Log In window.

The Need Help window displays.

Having trouble signing in?

- Forgot Password** - This feature is for password recovery in the event you've forgotten your password.
- Change Password** - This feature is for changing your password. If your password has expired or is about to expire, this feature will reset the password upon successful password change.
- Unlock Account** - This feature is to be used when your account is locked.



Choose the Forgot Password option. The “Forgot Password” window will open. Type your username in the Online ID field and your email in the Email Address field.

Click Send Recovery Email near the bottom center of the Forgot Password window.

Forgot your account's password?

Please enter your Online ID and Email Address associated to your account to initiate the password recovery.

Online ID *

Email Address *

Unlock Account

* - Mandatory Data Fields

The “Password will be emailed...” message displays.



Thank you! Your temporary password will be emailed to you shortly.

Check your email for notification of your password.

Try to log on to RealSuite once again.

Single Work Order RealMobile Access

To access your Work Order via the RealMobile application, you click on the Hyperlink that was provided within the RealSuite work order notification email.

DO NOT reply to this email / SVP NE REPONDEZ PAS A CE COURRIEL
* Service Provider to contact Requestor prior to site visit for access.

HEALTH, SAFETY, & ENVIRONMENTAL:

All workers must visit on-site hazard station to become familiar with any known hazards BEFORE start of any work.
Without exception, all workers must adhere to BGIS safety policies & applicable regulations.

SERVICE PROVIDER ID: 25189-BEE CLEAN BUILDING MAINTENANCE INC
WO#: CIB24615019

REQUIRED BY DATE: 02-Aug-2017 04:04 PM
PRIORITY: URGENT

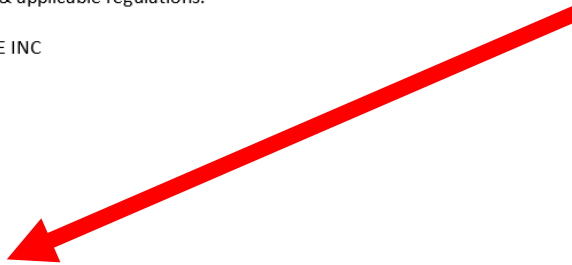
DESCRIPTION: Clean up spill on the floor.

:

[Click URL to access RealSuite WO:](#)

URL: <https://ua01.bljc.com/RealSuitePublic/userauth/workorder?wონum=CIB24615019&serviceProviderClass=VENDOR&serviceProviderNumber=25189>

BUILDING NAME: 05342_GARDINERS RD AND TAYLOR BLVD.



The Work Order notification email can be forwarded to your staff, or the Hyperlink can be copied and pasted into your work order system.

Clicking on the Hyperlink will launch the RealMobile vendor login page. Each Work Order has its own unique Hyperlink.

Logging in to View/Action Your RealSuite Work Order

The login page is displayed after clicking on the Hyperlink provided. Each Hyperlink is specific to the work order. Displayed on the Login page will be the Work Order number, Your Supplier ID number and email address. The first two fields will auto populate based on the Hyperlink.

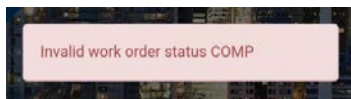
You must enter a valid work email address, this is a mandatory field.

The image shows a BGIS login form with three input fields and a submit button. Red arrows point from callout boxes to the fields:

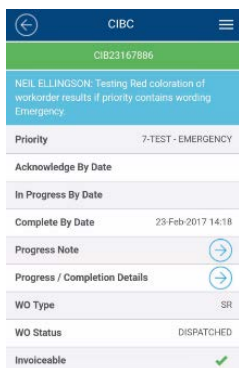
- Work Order number: CIB24615018
- Supplier ID number: 25189
- Work Email: Email

A blue button labeled "SUBMIT" is located below the fields.

If the work order you are trying to access is in a 'completed' status, you will receive the following error:



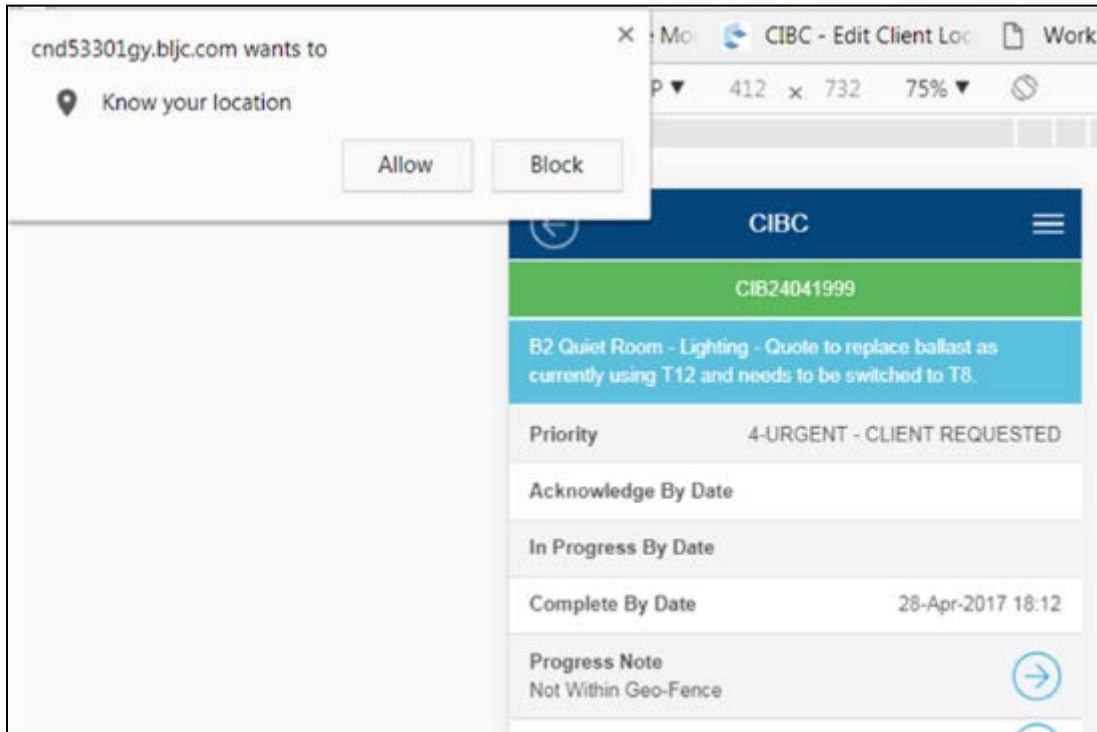
If the work order you are trying to access is in a 'Dispatched', 'Acknowledged' or 'InProgress' status, the screen will launch to the work order detail screen. You can then review the work order details. See section WORK ORDER FUNCTIONS.



Mobile Location Access
















Upon login to the Work Order RealSuite requires the location of the mobile device. While using the RealMobile application, a pop-up will appear requesting to “Know your location”.

Click Allow.



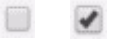





If the user clicks Block, the system will prompt the user to turn their Geo Location on, which must be done through the browser settings. If the user does not turn on their Geo Location, they will be prompted once more. If the user does not enable Geo Location, these will not be logged and validated.

REALMOBILE ICONS

Icon or Button	Icon or Button Name	Function
	Menu	Displays a menu. For example, this icon displays the menu of Work Order Functions in the Work Order detail screen.
	Page Back	Takes you back to the previous page.
	Filter	Filter allowing you to decide what data you want to see on screen.
	Search	Search allowing you to search for work orders using various work order parameters.
	Drilldown	Displays further detailed information or actions available for that work order detail field.
	Enabled	Identifies the work order detail field as Enabled.
	Disabled	Identifies the work order detail field as Disabled.
	Dollar Value	This field requires a Dollar Value.
	Form Inbox	Lists offline forms that are awaiting upload.
	Next	Form function – Navigates to the Next page within a form.
	Preview	Form Function – Displays a preview of the form.
	Cancel	Form Function – Cancels the form completion.
	Photo	Form Function – Add Photo to a form. Photos can be added via the camera or from the camera gallery.
	Delete	Form Function – Delete document from a form.
	Submit	Form Function – Submits the associated form.



	Back	Form Function – Navigates to the previous page within a form.
	Drop Down	Displays a drop down menu.
	Checkbox	Form Function – Checkbox. Check to enable.
	Mandatory	Denotes a Mandatory field.
	Barcode Scan	Form Function – This field launches the Barcode Scanner.
	Eraser	Form Function - Click to clear the field's current entry

WORK ORDER DETAIL

Field	Definition
Work order Number	Presents a client specific Work Order #
Description	Displays the details of the particular request.
Long Description	Displays further details of the particular request.
Priority	Identifies the priority of the Work Order.
Acknowledged By Date	Date and time by when work order status must be changed to Acknowledged
In Progress By Date	Date and time by when work order status must be changed to In Progress
Completed By Date	The date and time by when service is to be provided.
Progress Note	Shows the last Progress Note entered. Click Drilldown to show all Progress Notes.

Progress/Completion Details	Identifies work order status dates, Labour/Material information as well as Resolution Notes.
WO Type	Identifies the type of work order.
WO Status	Displays the current status of the work order.
Compliance	Identifies if the Work Order is Compliant
Invoiceable	Indicates whether or not work order can be invoiced.
Requestor	Represents the First and Last Name of the Requestor who identified the work
Requestor Phone	Represents the Requestors Phone Number
Building	Identifies the building / land #, the address details
Floor	Identifies the floor of the request.
Workspace	Identifies the workspace of the request.
Area	Identifies the particular area of the request.
Service Provider	Identifies the assigned Service Provider
FM	Identifies the Facility Manager.
Asset Group	Identifies the Asset Group #. Drilldown to list Building Items associated to the Asset Group.
Job Plan	Identifies the Job Plan Number. Click drilldown for Job Plan Tasking.
Building Item #	Identifies the Building Item Number. Click drilldown to show the Building Item detail.
Request Category	Represents the Category of the Service Problem.
Request Type	Represents the Subclass of the Request Category.
Service	Represents the type of Service
Quote	Stores the quoted amount for any Invoiceable work from Suppliers and Quote Type of Fixed or Do not exceed:
Quote Comment	Shows any comments associated to the Quote.
Reported On	Displays the Date and Time the work order was reported to BGIS.



Parent WO#	Displays the Work Order # of the Parent Work Order of the currently viewed work order.
Scheduled Start Date	Represents the Schedule Start Date of the Work Order
Conformance	Identifies if the Work Order is Conformance
Work Order History	Displays Work Order history for this Building by Request Category. Click on the Drilldown to show the work order list.
Forms	Drilldown to Work Order Forms.

WORK ORDER LOOKUP


The Work Order Lookup menu allows the user to look up and view work orders using various work order parameters.

How to Lookup a Work Order

Open the Work Order Lookup screen by clicking on Work Order Lookup from the main menu.



The Work Order lookup screen opens.



← Work Order Lookup

Client *

Work Order #

Request Description


WO Status

FMZ

Building

WO Type

Enter in your search parameters. NOTE: The system will default searches to the last 6 month period, unless a WO# has been provided and/or the Required By/To dates have been amended.

Once you have put in your parameters, click 

The work order lookup window will refresh with the list of work orders matching your search parameters.

← Work Order Lookup ☰

Found 180 work orders 

CIB18663997 - CM0C826 - ETC:04-Oct-2016 13:46
 SR-N-EMERGENCY-NDT-APP-81749-GUNNEBO CANADA INC
 Please repair the safe as the timer will not engage to unlock L...
 05432_BRITANNIA & LATIMER HEARTLAND BANKING, 5985 ..

CIB18665541 - CM0A544 - ETC:04-Oct-2016 17:57
 SR-N-EMERGENCY-NDT-APP-81749-GUNNEBO CANADA INC
 Please rekey the main branch door as a staff members hous...
 00560_ARMSTRONG, 2550 PLEASANT VALLEY RD. ARMSTR...

CIB18664478 - CM0A784 - ETC:07-Oct-2016 11:07
 PRJ-N-ROUTINE-NDT-APP-30791-DATAPLUS INC
 Attend site to investigate installing new standard pot lights o...
 00010_400 BURREARD ST. 400 BURREARD ST VANCOUVER BC

CIB18671146 - CM0A299 - ETC:08-Oct-2016 18:20
 SR-N-ROUTINE-NDT-APP-128231-PINCHIN LTD.
 RE: CIB18434915 NOT COMPLETE. Please call Client/Shaha...
 01800_LONSDALE & 16TH, 1601 LONSDALE AVE. NORTH VA...

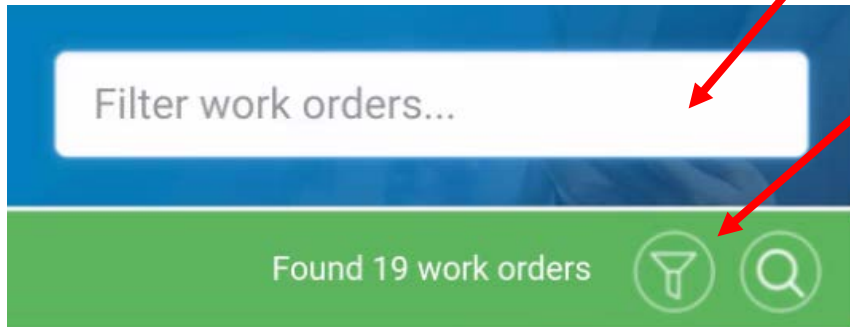
CIB18673248 - CM0C795 - ETC:09-Oct-2016 08:16
 SR-N-ROUTINE-NDT-APP-32329-KONE INC
 1. To repair/replace the hall door interlock on the 8 landing s...
 00792_QUEEN & WOODBINE BANKING CENTRE, 1852 QUEE...

Click on the work order to open up its details.

How to Filter Work Orders

To filter the list of work orders, click on the filter located near the top right corner of the screen.

This will open the filter. The filter is an open text field. You can search for Work Order Type, Work Order status, Building ID Etc.



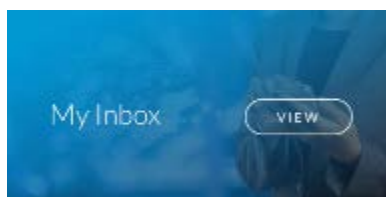
As you type, the work order list will filter.

To remove the filter, click the filter icon.

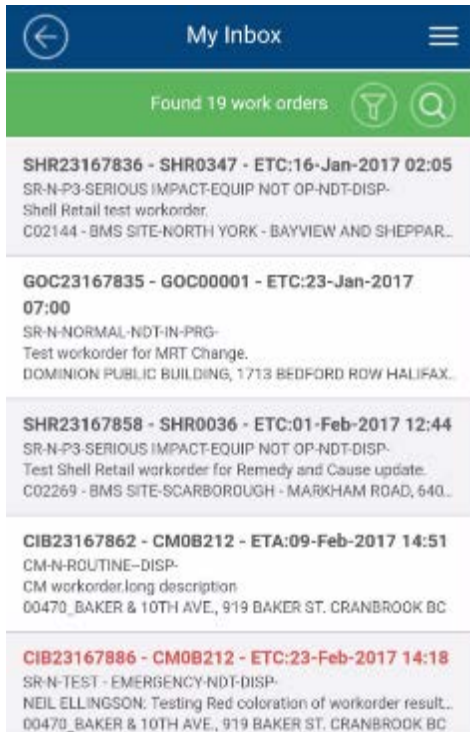
MY INBOX

The My Inbox menu allows the user to view and manage their work orders. Similar to the RealHelp My Inbox, only work orders assigned to the user will be displayed.

To access, click on the My Inbox menu option on the home screen.



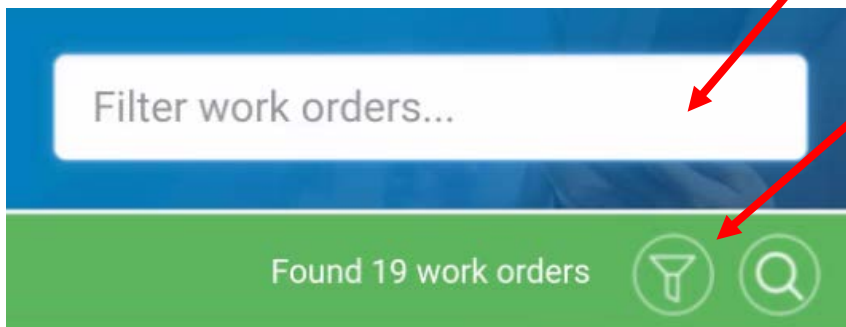
The My Inbox work order list will open.



How to filter Work Orders

To filter the list of work orders, click on the filter located near the top right corner of the screen.


This will open the filter. The filter is an open text field. You can search for Work Order Type, Work Order status, Building ID Etc.



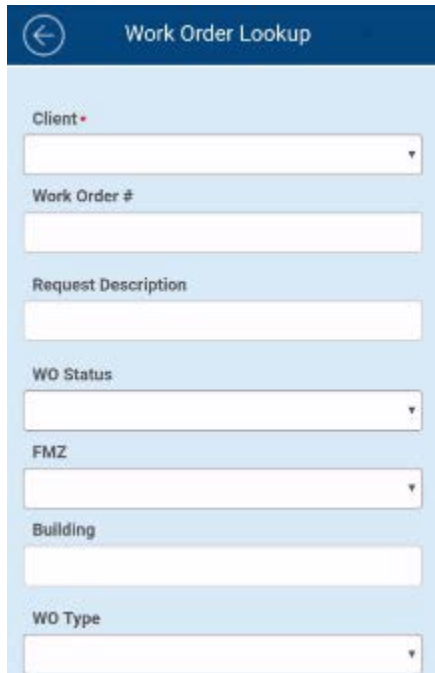
As you type, the work order list will filter.

To remove the filter, click the filter icon.

How to search Work Orders

To search for a work order, click on the search icon. 

The Work Order search screen will open.



The screenshot shows a mobile application screen titled "Work Order Lookup". It features a dark blue header with a back arrow icon and the title. Below the header, there are several search criteria, each with a text input field and a dropdown arrow: "Client", "Work Order #", "Request Description", "WO Status", "FMZ", "Building", and "WO Type".

Fill in your search parameters and click 

The screen will refresh with a list of work orders matching your parameters.

Click on a work order to view the details.

WORK ORDER FUNCTIONS

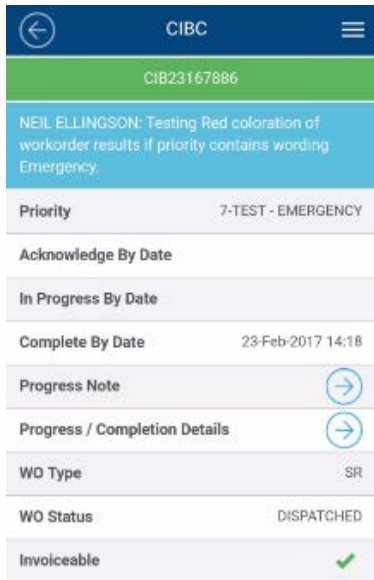
The RealMobile applications allows you to perform several work order actions as they would through the Desktop application.

How to change Work Order status

Common Work Order Status' with meaning:

DISPATCHED	Work order has been assigned to service provider.
ACKNOWLEDGED	Work order has been received and accepted by service provider.
ARRIVED	Assigned Work order Service Provider has physically arrived to site. This might be the first arrival or subsequent arrival.
IN PROGRESS	Work order has been initiated by the assigned Service Provider technician.
WAITING FOR APPROVAL	Quote has been submitted and is awaiting approval by BGIS.
APPROVED	Internal status used by BGIS to indicate the quote has been approved and the service provider may proceed with the quoted service.
LEAVE SITE	Assigned Work order Service Provider has physically left site due to parts, site access, awaiting quote approval, etc. This might be the first or subsequent leaving site event.
COMPLETE	Work has been physically completed.
CLOSED	Internal status used by BGIS to indicate payment against the work order, if Invoiceable. If the work order is Not Invoiceable, the payment will be applied per a service contract.

To change a work order status, start from the Work Order detail screen of the work order you want to change the status of.

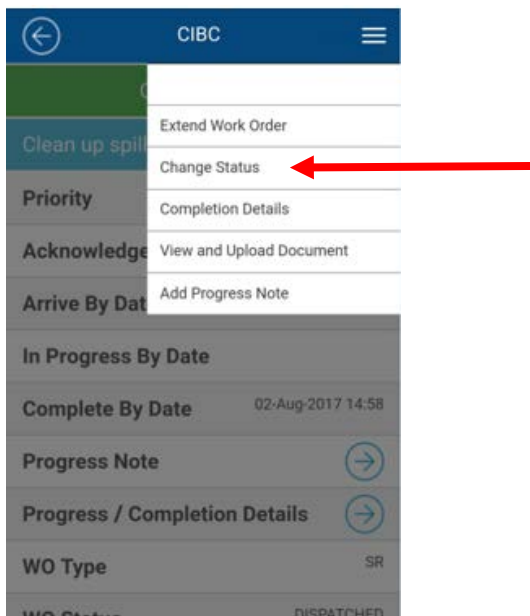


Click on the Work Order menu icon located at the top right corner of the work order detail screen.

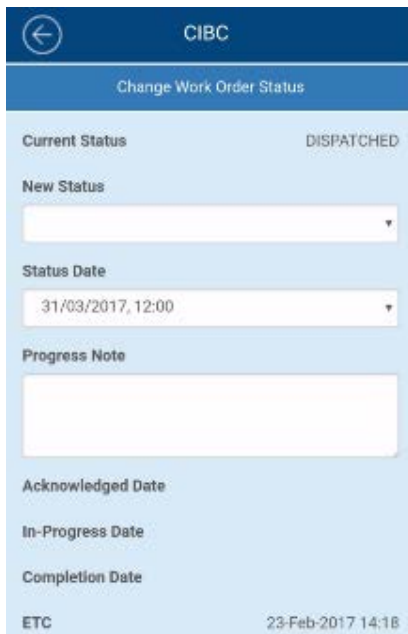


The work order action menu will open.

Click on Change Status.



The Change Work Order Status screen will open.



← CIBC

Change Work Order Status

Current Status DISPATCHED

New Status

Status Date 31/03/2017, 12:00

Progress Note

Acknowledged Date

In-Progress Date

Completion Date

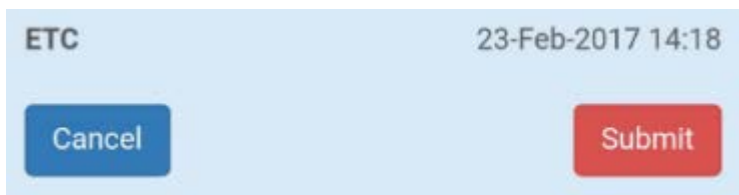
ETC 23-Feb-2017 14:18

The Status will be at the top of the screen. Click on the New Status drop down to choose the status you would like to change the work order to.

The status date will default to the current time, if the time of the status change was different than the current time, you can adjust it here.

Enter in the Progress Notes as to why you are changing the work order status.

Click on Submit to save the changes. Click cancel to cancel the changes.

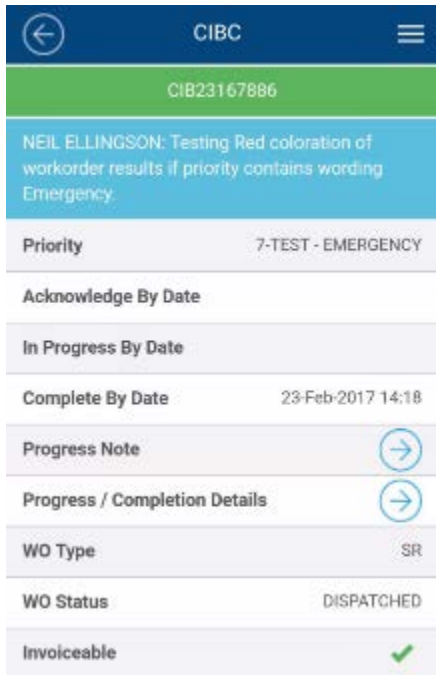


ETC 23-Feb-2017 14:18

Cancel Submit

How to complete a Work Order

To complete a work order, start from the Work Order detail screen of the work order you want to complete.

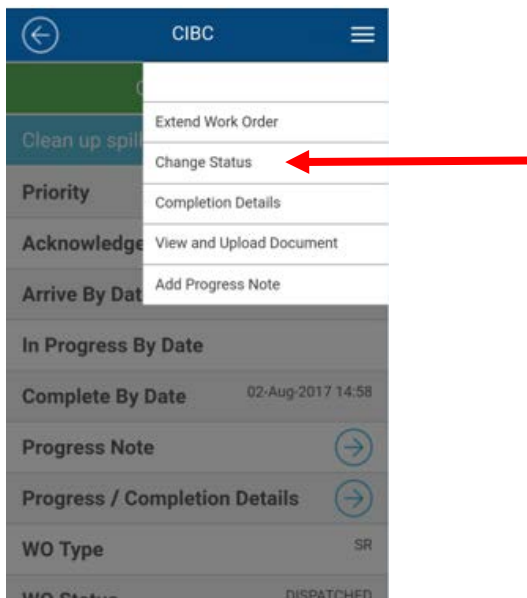


Click on the Work Order menu icon located at the top right corner of the work order detail screen.

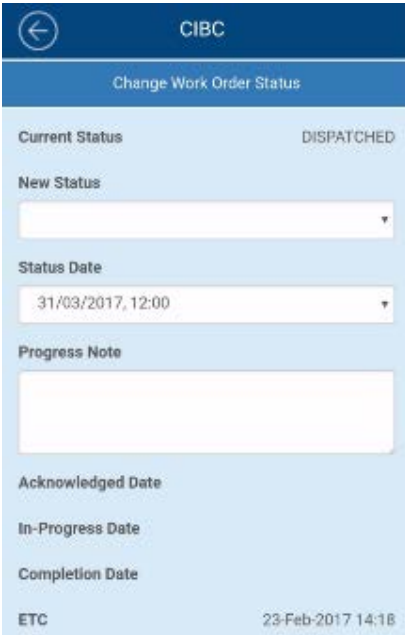


The work order action menu will open.

Click on Change Status.



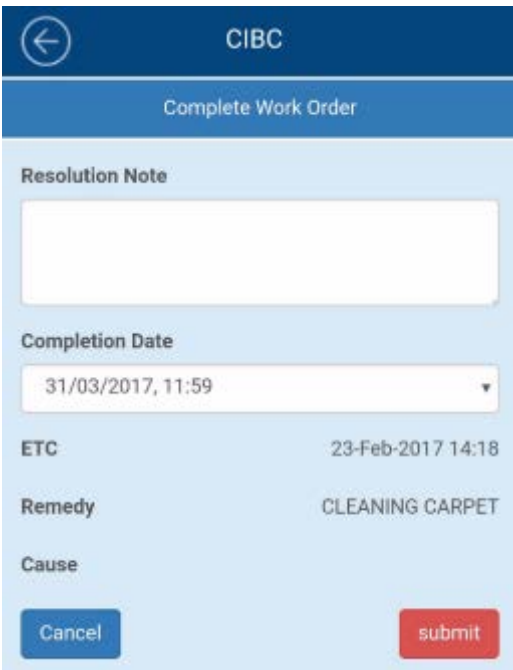
The Change Work Order Status screen will open.



A screenshot of the 'Change Work Order Status' screen. The header is dark blue with a back arrow and 'CIBC'. Below is a light blue bar with 'Change Work Order Status'. The main area is light blue and contains: 'Current Status' (DISPATCHED), 'New Status' (a dropdown menu), 'Status Date' (31/03/2017, 12:00), 'Progress Note' (a text input field), 'Acknowledged Date', 'In-Progress Date', 'Completion Date', and 'ETC' (23-Feb-2017 14:18).

The current Status will be at the top of the screen. Click on the New Status drop down and choose COMPLETE.

The Complete Work Order window will open.



A screenshot of the 'Complete Work Order' screen. The header is dark blue with a back arrow and 'CIBC'. Below is a light blue bar with 'Complete Work Order'. The main area is light blue and contains: 'Resolution Note' (a text input field), 'Completion Date' (31/03/2017, 11:59), 'ETC' (23-Feb-2017 14:18), 'Remedy' (CLEANING CARPET), 'Cause', and two buttons: 'Cancel' and 'submit'.

Enter in applicable resolution notes. Resolution notes are mandatory and should reflect what was done to complete the request. "Complete" is not an acceptable resolution note. This is a free text field.

Confirm the Completion Date. To amend the Completion Date, click on the drop down and choose the correct Completion Date.

Click submit to complete the work order. The work order will be completed and will take you back to the work order detail screen.

How to extend a Work Order

To extend the Complete By Date on a work order, start from the Work Order detail screen of the work order you want to extend.

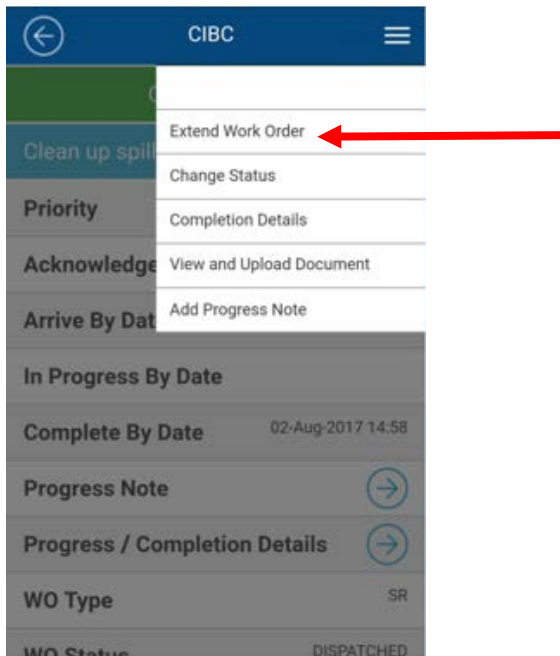


Click on the Work Order menu icon located at the top right corner of the work order detail screen.

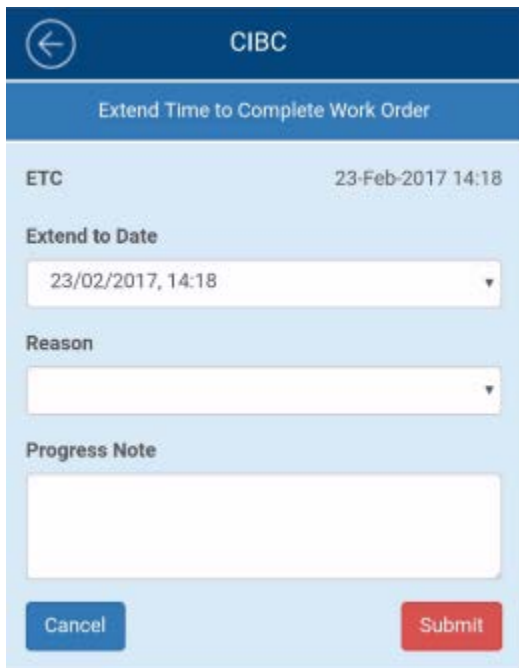


The work order action menu will open.

Click on Extend Work Order.



The Extend Time to Complete Work Order window will open.



The current ETC will show at the top of the window. The Extend to Date can be amended by clicking on the dropdown and selecting the date in which you would like to extend the work order to.

Enter in the reason for extending the work order. Click on the drop down and pick one of the available options.

Enter in applicable Progress Notes.

Click submit to extend the work order. Click Cancel to cancel the action of extending the work order.

How to add a Progress Note

To add a Progress Note to a work order, start from the Work Order detail screen of the work order you want to add the Progress Note to.

NOTE: All notes, details and information contained within a RealSuite work order are visible to internal staff, clients and third party vendors. Work Order progress notes are used for audit and traceability purposes. When updating and adding progress notes in the work orders ensure appropriate wording is applied.

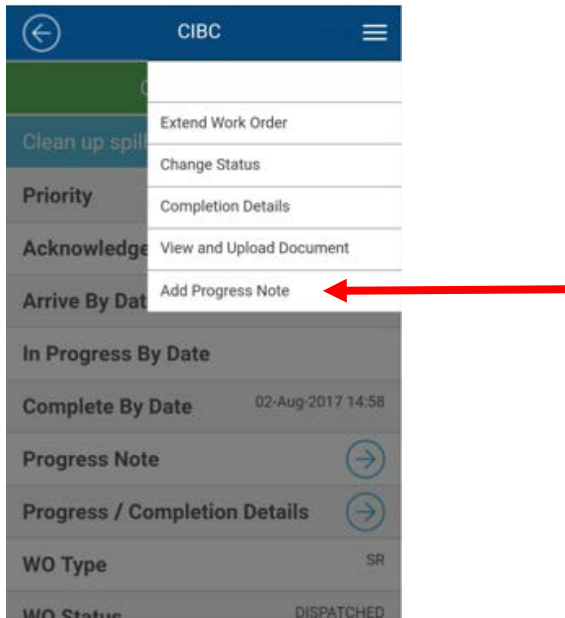


Click on the Work Order menu icon located at the top right corner of the work order detail screen.



The work order action menu will open.

Click on Add Progress Note.



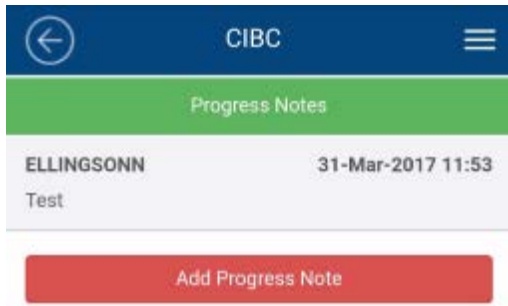
The Add Progress Note window will open.



Enter in the Progress Note in the free text field.

Click submit to add the Progress Note. Click Cancel to cancel the action of adding a progress note to the work order.

NOTE: You can also add a Progress Note by clicking on the Drilldown icon located on the Progress Note field on the Work Order detail screen. The Progress Notes window will open.



Click on Add Progress Note to open the Add Progress Note Window.

Enter in the Progress Note in the free text field.

Click submit to add the Progress Note. Click Cancel to cancel the action of adding a progress note to the work order.

How to view and upload a document to a Work Order

To view and upload a document to a work order, start from the Work Order detail screen of the work order you want to view and upload a document to. Documents can include; Quotes, Pictures etc.

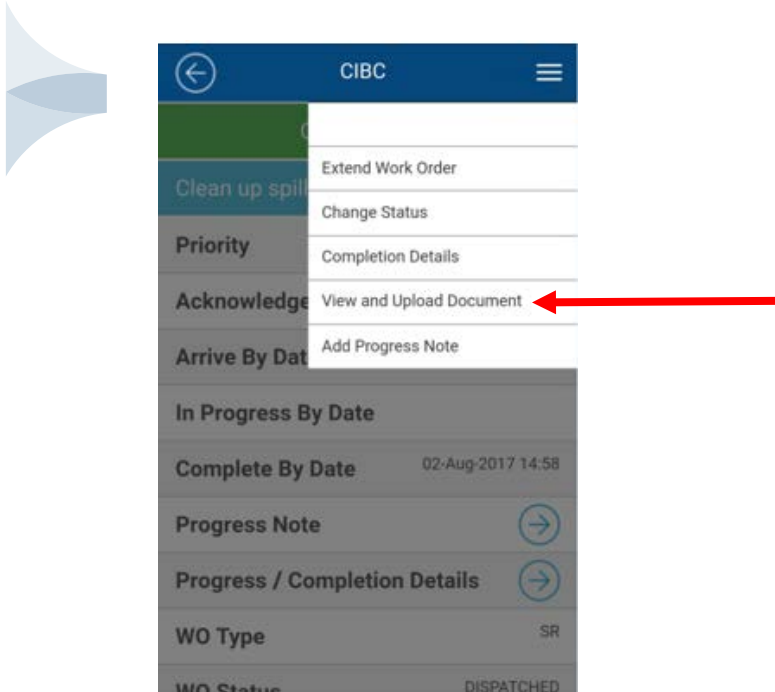


Click on the Work Order menu icon located at the top right corner of the work order detail screen.

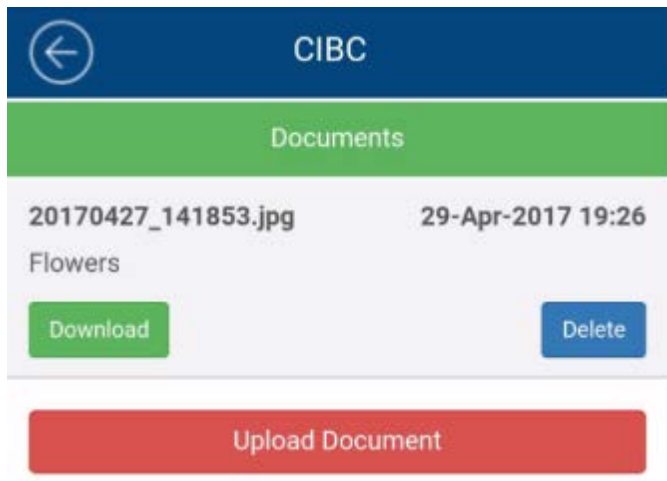


The work order action menu will open.

Click on View and Upload Document.



The View and Upload Documents window will open.

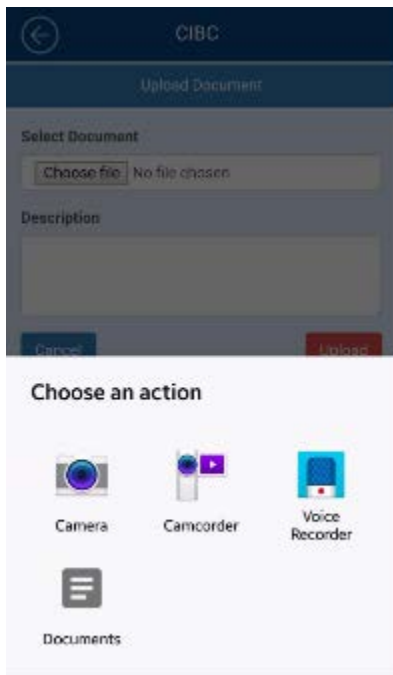


Any documents attached will be listed. To view click on the download button. The document will be download to your mobile device.

To upload a new document, click on Upload document. The Upload document window will open.



Click on Choose file. The Choose Action window will open.



From the Choose an action screen, you can add a picture by taking it with your camera, a video from your camcorder, a voice note from your Voice Recorder, or any saved documents located in your documents folder (including your camera gallery).

Once you have chosen the document you would like to upload. Fill in the Description of the document in the field provided.

Click submit to upload the document. Click Cancel to cancel the action of uploading the document to the work order.

RealForms

RealForms is an integrated RealSuite application that will allow you to complete, review and submit forms via the RealMobile platform. Functionality has been built so that forms completed via a WO will automatically be attached to the WO.

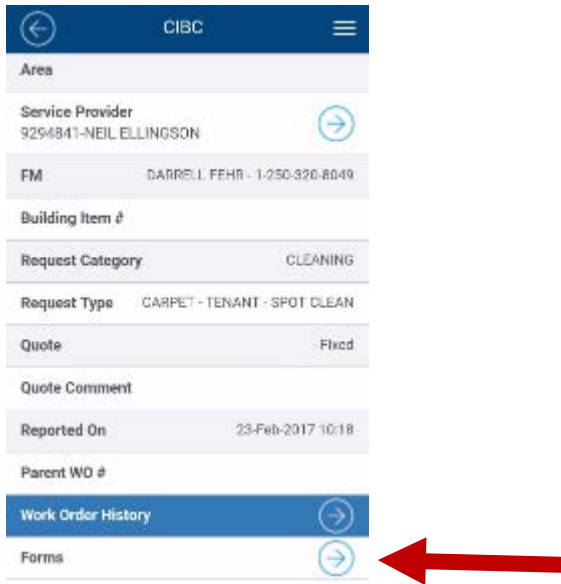
How to complete and submit a Work Order Form

To complete and submit a Work Order Form, start from the Work Order detail screen.

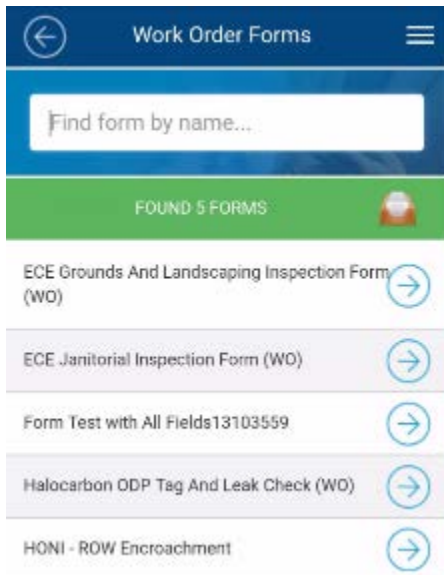


CIBC	
CIB23167886	
NEIL ELLINGSON: Testing Red coloration of workorder results if priority contains wording Emergency.	
Priority	7-TEST - EMERGENCY
Acknowledge By Date	
In Progress By Date	
Complete By Date	23-Feb-2017 14:18
Progress Note	→
Progress / Completion Details	→
WO Type	SR
WO Status	DISPATCHED
Invoiceable	✓

Click on the Drilldown Icon on the Forms field to open the Work Order Forms screen.



The Work Order Form window displays a list of available work order forms.



You can search for a particular form by typing in the search box. Click on the Drilldown icon to the left of the form you wish to complete. The Form will launch.



ECE Grounds And Landscaping
Inspection Form (WO)

Would you like an ECE Refresher Training?

Refresher? *

No

back next preview cancel 1 of 22

There are various field types within the form, such as drop downs, photos, free text. Mandatory fields will be denoted in Red.

Navigate through the form by using the Back and Next buttons located on the bottom of the form.

You can preview the form by clicking the Preview button located at the bottom centre of the form.

Once you have completed the form, click on Submit button located at the bottom of the form. The Submit button will show on the last page of the completed form.



back submit preview cancel 1 of 1

Click Cancel if you want to cancel the action of completing and submitting this form.