

With the release of our new compliance dashboard, below are some recommended guidelines to ensure your data is in good condition to be able to take full advantage of this exciting new feature!

 Utilize the Is Compliance Related checkbox if the work will be performed to fulfill a compliance requirement. Check this box on all relevant Work Orders, Scheduled Work Orders, and Templates for any of the TheWorxHub applications you own. *Note: The Is Compliance Related box is only visible for users with the Can See Compliance Checkbox permission in <u>Users' Roles & Permissions</u> under the Work Orders section in Settings.

I required field			
required lield			
Application	Priority *	Su	bscribe to email updat
Maintenance	* [Select]	* Due Date	Due Today
Location *	· · · · · · · · · · · · · · · · · · ·	5/15/2023	
Begin typing to select a loca	ation 🛛 🖉 📘	Appt Start	Appt End
Details	UPick len		
Task List + Add New Task	(Tasks Completed: 0	// // // // // // // // // // // // //	
Task List + Add New Task Category *	(Tasks Completed: 0 Subcategory *) of 0)	
Task List + Add New Task Category * [Select]	(Tasks Completed: 0 Subcategory * *) Select a Work Order Ca) of 0)	
Task List + Add New Task Category * [Select] Source of Work *	(Tasks Completed: 0 Subcategory * * Select a Work Order Ca Requestor) of 0)	
Task List + Add New Task Category * [Select] Source of Work * [Select]	(Tasks Completed: 0 Subcategory * * Select a Work Order Ca Requestor) of 0)	



Questions? Contact Client Services Phone: 1-877-655-3833 Email: <u>support@brightlysoftware.com</u>

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2. Make sure the assets that you have added are linked to corresponding Work Orders and Scheduled Work Orders. *Note: Also, be sure to unlink retired assets from your active compliance-related Scheduled Work Orders.

Work Order					×
Electrical	* Eme	rgency Generators 🔹		celozionor emergency em	*
Source of Work	Reque	stor	TJC	The Joint Commission Inventory of Utility Systems	
PM	*			EC.02.05.01 Utility Syste	
Is Compliance Related	Reque	stor Phone]		
	Sa	Ve Print Wa	rk Order	Cancel	
This Work Order was	generated fr	om the Sched WO G	enerator	(Fixed) - Weekly	
Add this WO to a proj	ect				
Labor: 1 assigned (Eric	Bacon)			-	
Inventory: No items as	signed			•	
Asset: 1 asset select	ed (HOS-Gl	EN-001) 🧹 🗖		•	
Link Assets				•	
Assigned Assets	5			-	
	6 - HOS-GEN ocation: Hosp lanufacturer:	-001 oital > Grounds : Model: QT15	068ANAC	Tag: G-123	
A	ge: 17 yrs	Serial#:			
	arcode#: 490	45486541524	152		
A	sset Details:	Manual attached			
		serviced by GE		Unlink	
					*
				Navigate to tab Clo	se



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- 3. Take advantage of the **Pass/Fail** task list type to link templates that will generate corrective actions upon failure.
 - Step 1: Create the necessary corrective action templates.

ashboard		Users I	Location Su	urvey/Inspect	Templates	Pick Lists W	ork Order Proje	cts Safety	Misc PO/Inven	tory R	isk	
arch	L L	Work Order										
ounds	s	Show: Filter	Application: All	•	Femplate For: WOs	•	+ Add V	/ork Order Templa	te + Add Schedu	led Work O	rder Te	mplate
sets		Show 50	✓ entries						Search:			
lendar		# Applic	cation			Departme	nt Labor	Priority	Owner	Requests	W0s	Sch W
orts	1	x										
ons		x									ł	
	1	х										
	1	# 11 CORR	RECTIVE ACTIO	DN - Fire Door		Maintenar	nce **No Labor**	2 - High	DSI Health			
	1	¥ 58 Correc	ctive Action - Fix	k Leaks		Maintenar	nce ""No Labor""	2 - High	PT Healthcare	0	~	
		¥ 67 CORR	RECTIVE ACTIC	ON - Replace E	Eye Wash Station B	ottle(s) Maintenar	nce "No Labor"	2 - High	PT Healthcare	U	4	
	4	¥ 37 CORR	RECTIVE ACTIC	ON - Replace F	an Belts	Maintenar	nce "No Labor"	2 - High	PT Healthcare		~	
		¥ 84 Correc	ctive Action - Re	eplace Gauge		Maintenar	nce **No Labor**	2 - High	PT Healthcare		<	

• Step 2: Add or adjust the task list on your Scheduled Work Orders.

Work Order	×	ates in 7 D
Task List		×
1.	h Time	- Î
Perform Visual Inspection	t lime 🔲	- 14
Check for debris and check belts. Place testing sign on fire panel and send email notification of testing happening.	Billable	Ш
2.		
Test Emergency Light Pack	it Time 🔲 🔳	- 14
Procedures	li li	
Corrective Action Required on Fail? O		
3.		
Record Battery Voltage Esi	it lime 🛄	
Procedures		
Linked Meter: 5-13 Battery Volts (Voltage) Linked - Edit Remove		
How Many Readings? 1 V		
	Save	Cancel
Source of Work Requestor		
Navigate to I	tab Close	tes in 17 D



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Overvie Work Order	dscaping
Work Monthly Generator Test on the last Tuesday @ 7:15am. Perform test early in the morning outside	monthly
Task List	×
1. Perform Visual Inspection Check for debris and check belts. Place testing sign on fire panel and send email notification of testing happening.	^
Add Note	
2. Test Emergency Light Pack	
Add Note	
3. Record Battery Voltage Linked Meter: 5.13 Battery Voltage) Linked - 1 Readings Required. Incremental: 0.00 Voltage	
Add Note	
4. Record Water Temperature Linked Neter: 5.13 Water Temperature (Degrees) Linked - 1 Readings Required. Threshold: 170.00-190.00 Degrees	
Add Note	
Sauc	Cancel
	Cancer
Custor Staff R Pdot Work Order	
Asset I Invent	1 Days Past

Overvie	Work Order	dscaping Tr
Work	Monthly Generator Test on the last Tuesday @ 7:15am. Perform test early in the morning outside of heavy elevator use.	The second secon
Task Lis	st	×
1. Perf	Take Corrective Action	×
Check testin	This task list item <i>Test Emergency Light Pack</i> was marked as Fail. This task list item is set to trigger the following template:	- i
2. Test	#135 - Corrective Action - Replace Generator Emergency Light Pack	
	Set Location of Work () Single Location () Multiple Locations	
	Location	
3. Reco Linked	Dude Care Center	0 😭
Incren	Details	
4. Reco	Assets	
Thresh	✔Kohler Generator - Waverly Apt (5.13)	
	Attachments	
	Upload Photo	
	Save Corrective Acti	on Cancel
Custo		
Staff R	Save Print Work Order Cancel	-
invente	Navigate to tab Close	1 Days Pastdue



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