

CBRE Assure Work Order Management Solution for CBRE Macquarie  
Quick Reference Guide

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## 1. Overview

CBRE in the management of service to Macquarie Group, has engaged Damstra Technology to help the suppliers manage Work Orders assigned to them. Damstra's CBRE Assure (also known as CBRE TIKS Assure) is an application that has been designed to effectively manage work orders and do the below actions electronically.

- Do a pre-risk risk assessment of the work.
- Apply for permit to work and access site for the work.
- Upload and review documents related to the work.

## 2. Assistance

If you have any questions or require assistance with the registration process, please contact Damstra Technology on Australia 1300 722 801, New Zealand 0800 722801, USA 888 8377688 or UK 020 39952399 or for any other country on [service@damstratechnology.com](mailto:service@damstratechnology.com). or through Damstra online chat. There will also be a chat support function available on each page when you are working in the systems.

## 3. Users

CBRE Assure will be available for suppliers of CBRE who have already registered their company in Damstra EPP Worker Management portal and mobilized workers for Macquarie sites. Onboarding a supplier to CBRE Assure is done by the CBRE Team. Once a supplier is onboarded to CBRE Assure, the supplier administrators and workers of the supplier company will receive email notifications inviting them to register with CBRE TIKS Assure.

## 4. Roles

CBRE Assure has three types of users.

1. Supplier administrator – Supplier side administrator or supervisor who receives work orders and assigns it to workers within the company. Administrator will review the work done by technician and verifies it.
2. Supplier workers – Workers or technicians who work on jobs assigned to the company. Terms worker and technician used in this document refers to the same role.
3. CBRE Facility Managers (FMs) – CBRE FMs review the Pre-start risk assessment completed by workers and accept their request to access site to perform the work.

## 5. Interfaces

CBRE Assure has two interfaces available.

1. The web portal – CBRE Assure web portal is available for roles Supplier administrator and Facility Managers. The URL to access the web portal is available in CBRE's supplier landing page for Macquarie suppliers [greensuppliercompliance.com](https://greensuppliercompliance.com). You can launch the web portal by clicking [here](#).

2. The mobile app – CBRE Assure has a mobile app designed for workers/technicians. The technicians are on the move and the mobile app helps them to act on work orders assigned to them proactively. The app is available in play store and app store and is has the name CBRE TIKS Assure. Please see a snippet of the app icon below.



Download the app from respective stores using the below hyperlinks.

[Android](#) & [iOS](#)

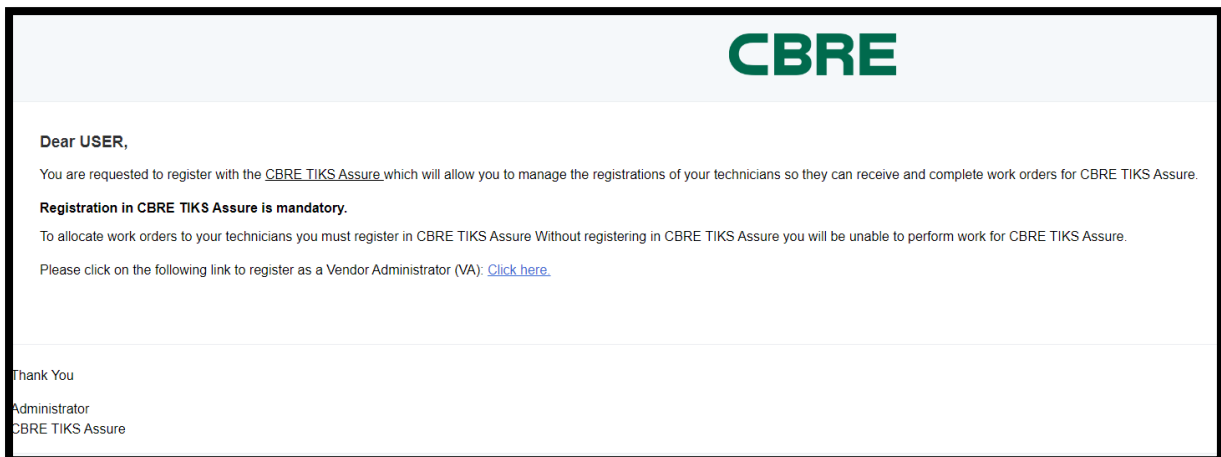
## 6. Onboarding

CBRE team will communicate to the supplier via emails upon onboarding them to CBRE Assure. There will be trainings conducted for suppliers prior to onboarding. If you miss the training, guides and video tutorials are available at [CBRE's supplier landing page](#).

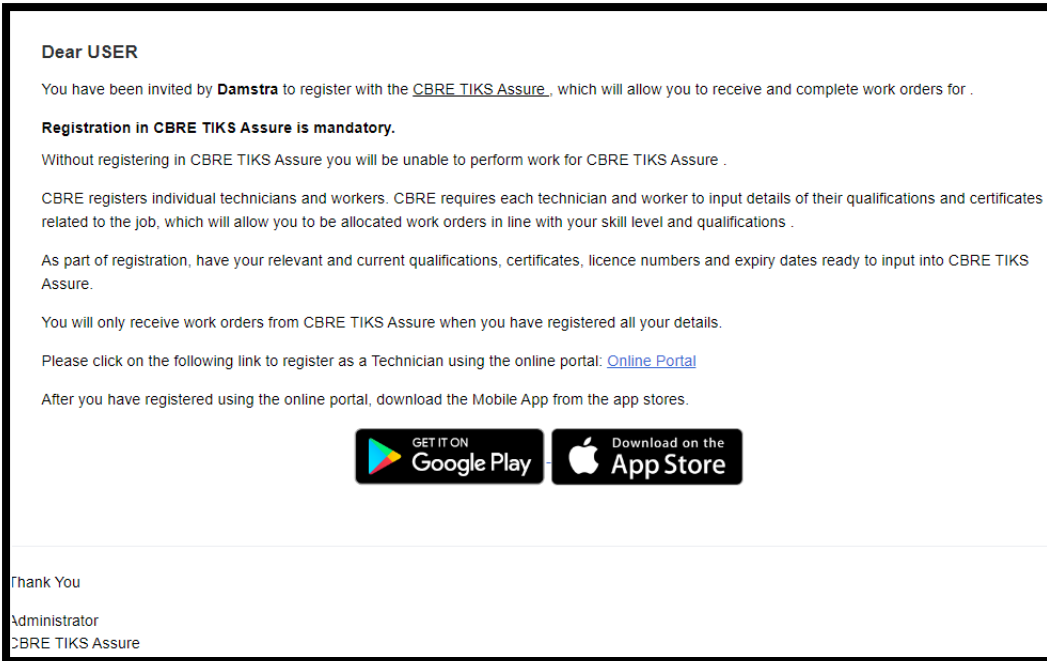
Supplier administrators and workers will receive an invitation email from [cbre@tiks.com.au](mailto:cbre@tiks.com.au) with subject '*You are invited to register with CBRE TIKS Assure*'. If recipients cannot find this email in their inbox, recommendation is to check the junk/spam folder too.

Both supplier admins and technicians will receive invitations that looks like snippets below.

Invitation to supplier admin.



Invitation to workers.



The recipients must launch the online portal hyperlink to complete the registration which ask for some basic details to complete their profile. Once registered, supplier admins can launch the web portal and login and workers or technicians can download the app in their mobile device and login.

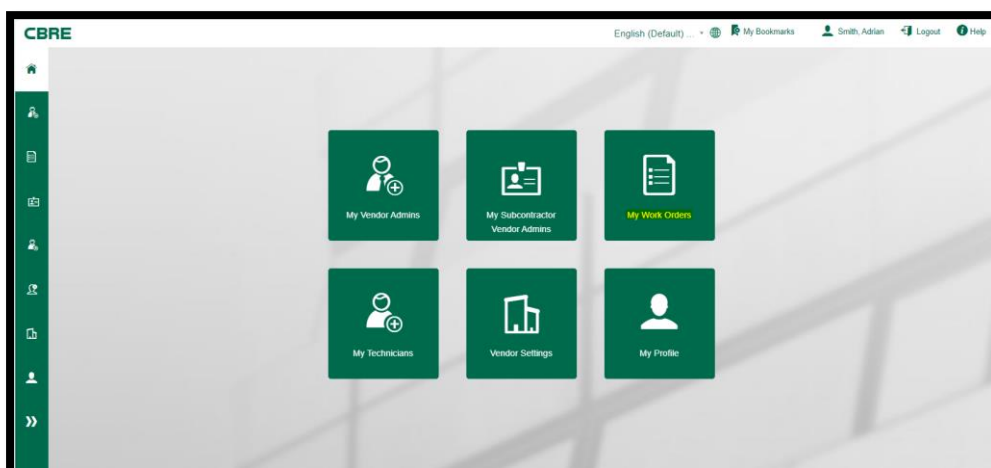
## 7. Process

Please see the end-to-end process of CBRE Assure outlined below.

### a. Creation and assignment of work orders | Supplier Administrator

When a job needs to be performed by the supplier, the CBRE Facility Manager will assign the job to the supplier company. The supplier admin (person(s) who registered as admin in the Damstra Worker Management EPP) will receive an email from [cbre@tik.com.au](mailto:cbre@tik.com.au) stating that a new Work Order is assigned to the company.

- Supplier admin can log in to [CBRE TIKS Assure](#) to review and accept the work order.
- Upon login, the admin can see many options. To review Work Orders assigned to their company, go to the *My Work Orders* option.



- All open work orders assigned to the supplier company can be viewed here. Work orders can be at different stages and can be identified by the *WO Status*.

Priority	WO Completion Date/Time	ETA	Date Created	WO Number	WO Status	Client	Client Site Id	Location	Location Address	Location State	Wo Type (R/M/FM)	Vendor	Site Contact Name	Site Contact Phone Number	Descrip
P3	16/02/2024 00:54	15/02/2024 13:52	14/02/2024 23:57:20	C503605	ADMIN DOC SUBMITTED	MGL	MGLSYD800	50	50 Martin Place	N/A Sydney	Reactive Maintenance	(VERTIV (AUSTRALIA) PTY. LTD.)	Vivek Sreedhar	000	After h extend usage: update
P4	12/02/2024 22:44	13/02/2024 05:30	12/02/2024 04:14:10	C503604	ADMIN DOC REQUIRED	MGL	MGLSYD300	1	1 Martin Place	N/A Sydney	Reactive Maintenance	(VERTIV (AUSTRALIA) PTY. LTD.)	Martin Das	495865	Additio Cleanin
P4	12/02/2024 21:51	13/02/2024 10:00	12/02/2024 04:11:52	C503603	ADMIN DOC SUBMITTED	MGL	MGLSYD300	1	1 Martin Place	N/A Sydney	Reactive Maintenance	(VERTIV (AUSTRALIA) PTY. LTD.)	Martin Das	495865	Securit
P4	12/02/2024 20:56	12/02/2024 17:35	11/02/2024 08:08:34	C503601	ADMIN DOC SUBMITTED	MGL	MGLSYD300	1	1 Martin Place	N/A Sydney	Reactive Maintenance	(VERTIV (AUSTRALIA) PTY. LTD.)	Martin Das	495865	Additio Cleanin

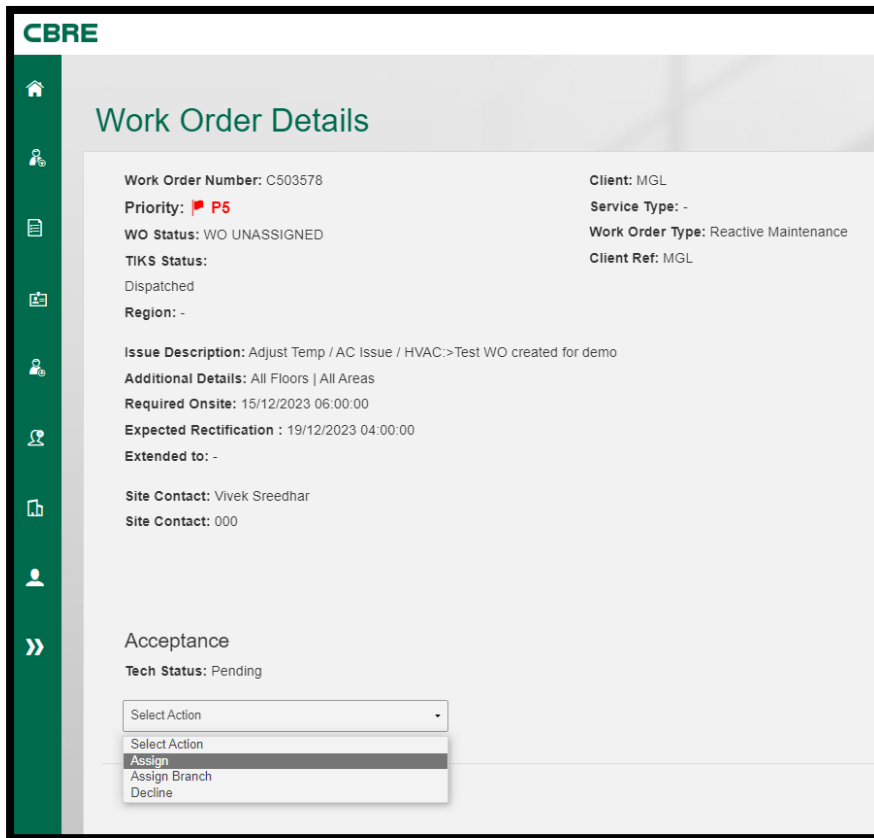
- Admin can sort the report as per *Data Created* to see latest work orders. Look for *WO Unassigned* status for Work orders that need to be actioned.

P5	-	No ETA presented	14/12/2023 04:06:30	C503578	WO UNASSIGNED	MGL	MGLSYD800	50	50 Martin Place	N/A Sydney	Reactive Maintenance	Martin Place	Martin Place	000	
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- Click on the *WO Number* and admin can view the work order details.

<b>Work Order Number:</b> C503578	<b>Client:</b> MGL	<b>Site Name:</b> 50 Martin Place
<b>Priority:</b> P5	<b>Service Type:</b> -	<b>Address:</b> 50 Martin Place
<b>WO Status:</b> WO UNASSIGNED	<b>Work Order Type:</b> Reactive Maintenance	<b>City/Postcode:</b> -
<b>TIKS Status:</b> Dispatched	<b>Client Ref:</b> MGL	<b>GPS Coordinates:</b> -
<b>Region:</b> -		<b>Client Site Id:</b> MGLSYD800
<b>Issue Description:</b> Adjust Temp / AC Issue / HVAC->Test WO created for demo		<b>Vendor:</b> (VERTIV (AUSTRALIA) PTY. LTD.)
<b>Additional Details:</b> All Floors   All Areas		<b>Vendor Branch:</b> VERTIV (AUSTRALIA) PTY. LTD.
<b>Required Onsite:</b> 15/12/2023 06:00:00		Essential Site Information
<b>Expected Rectification:</b> 19/12/2023 04:00:00		
<b>Extended to:</b> -		<b>PO Amount:</b> \$ 0.00
<b>Site Contact:</b> Vivek Sreedhar		<b>Site Contact Number:</b> 000
<b>Site Contact:</b> 000		<b>Facilities Manager (FM):</b> Lindsay Gomes
		<b>FM Email:</b> Lindsay.Gomes@macquarie.com
		<b>FM Number:</b> 000-000-0000
<b>Acceptance</b>		
<b>Tech Status:</b> Pending		
Select Action		

- Go to the *Acceptance* section below to assign the work order to a technician or decline the work order.

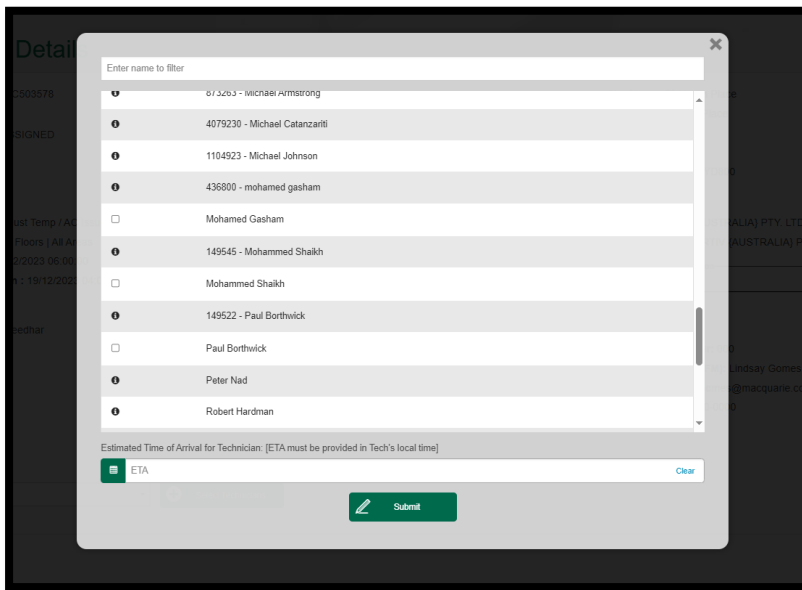


- If you choose to assign the work order to one of the technicians/workers of your company, select *Assign* in the dropdown and go to *Select Technician*.

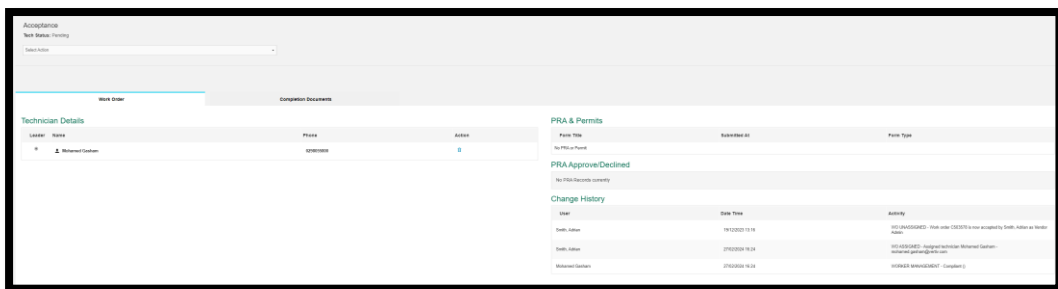


- This will open a list of the technicians from your company. You may assign the work order to a compliant technician. *To be compliant, a technician must have successfully completed all the inductions assigned to them and provide proof of identification and qualification in*

*Damstra Worker Management.*



- Tech Status goes to Pending and technician details are added to the work order.



b. Prestart Risk Assessment | Supplier Worker/Technician

Technicians must install the CBRE TIKS Assure mobile app in their device to receive and work on a work order. The app can be installed from [app store](#) or [play store](#).

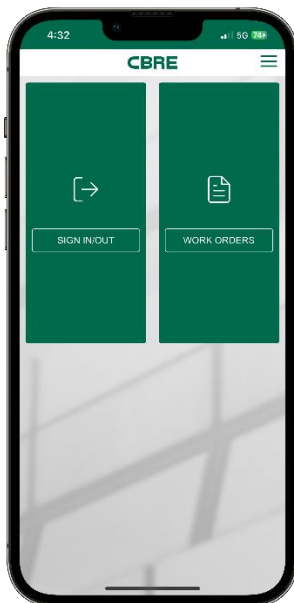




- Once a work order is assigned to technician, the app notifies them of the new work order.

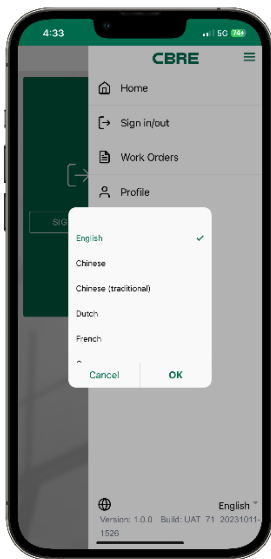


- Upon login, the app has a *Work Order* button which the technician must select. Ignore the *Sign In/Out* button. There is a hamburger menu on top right corner which will lead the worker to configurations.

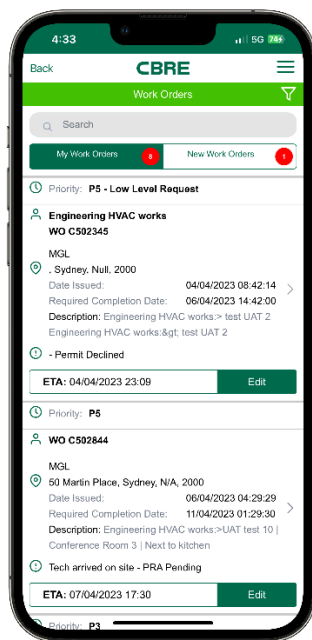


- The app and its contents can be translated to 12 languages (Chinese, Traditional Chinese, Dutch, French, German, Hindi, Italian, Japanese, Korean, Malay, Spanish and Thai) by

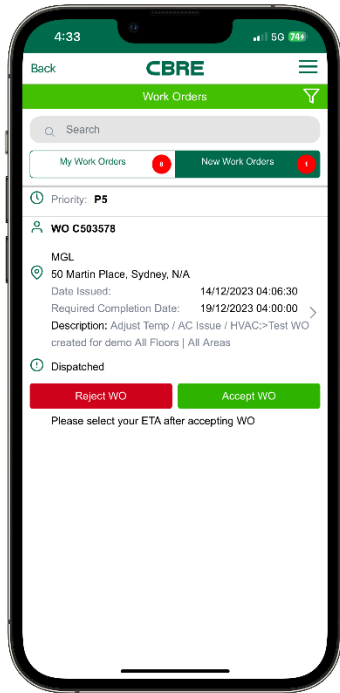
choosing the language lookup on the bottom right of the screen.



- On selecting the Work Order option on the *Home* screen, worker can see 2 options.
  - My Work Orders  
This lane shows the existing work order he/she has accepted and is working on.

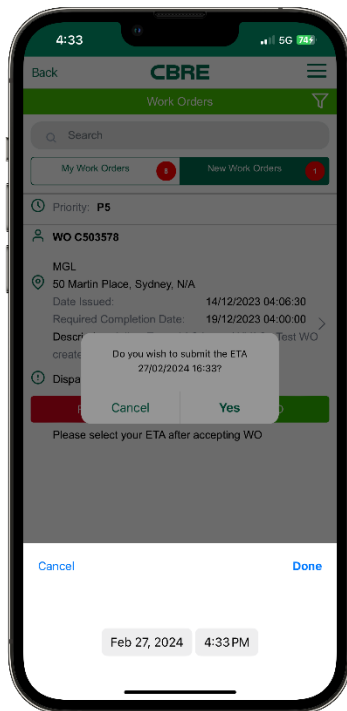


- New Work Orders  
This section shows the new work orders assigned to the worker which are yet to be accepted/rejected.

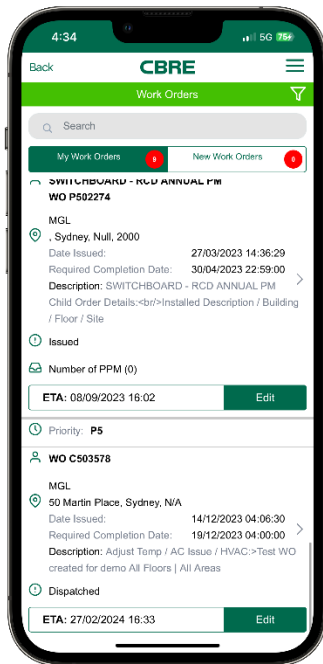


If a work order is rejected by a worker, it goes back to the *WO Unassigned* status and supplier admin must assign it again.

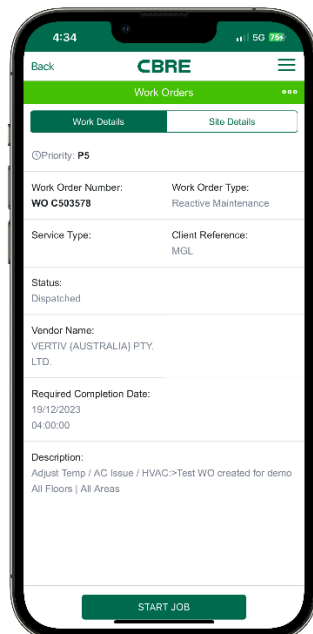
- A worker can accept a work order by selecting the *Accept WO* button. It immediately asks the technician for an ETA.



- Upon accepting a Work order it moves from New Work Orders to My Work Orders list.

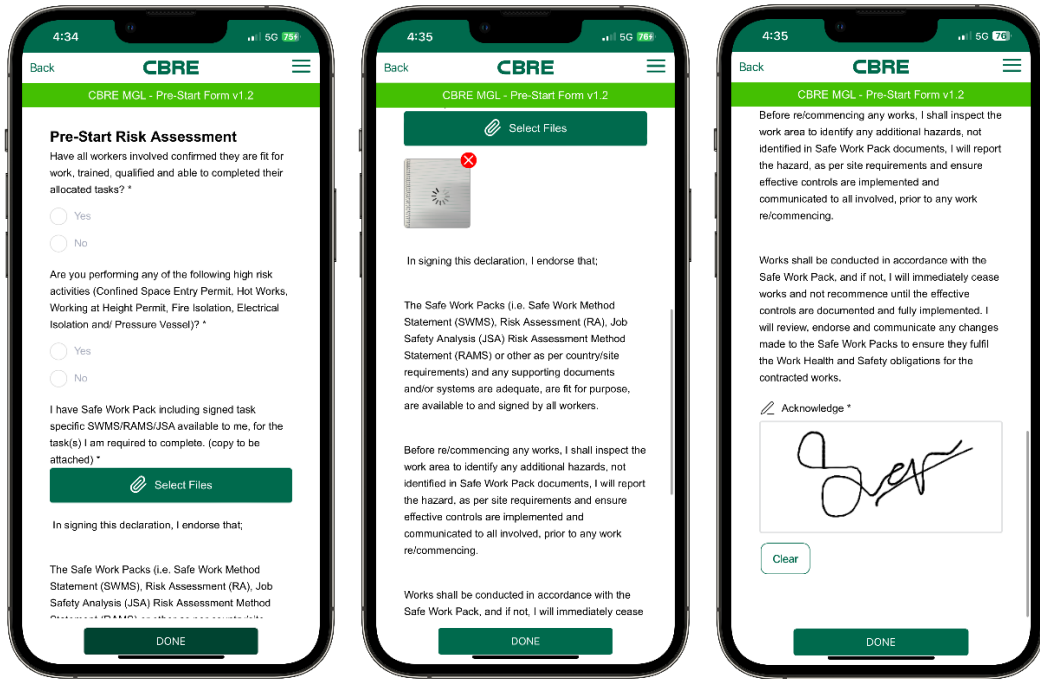


- Tap on a work order and technician will be taken to the Work Order page. This shows all the details on the work order including:
  - Priority
  - WO number and type
  - Current status
  - Estimated completion date and time
  - Details on location and issue



When a technician is ready to address the job they can select *Start Job* button.

- First step of the job is to conduct a Pre-Start Risk Assessment (PRA). The PRA form that opens will have several questions related to the worker and the job they are about to conduct under this work order.



PRA form ask for details including the below.

- Upload the safe works pack (SWMS (Safe Work Method Statement)/RAMS (Risk Assessments and Method Statements)/JSA (Job Safety Analysis))
- If the job involves a high-risk activity, upload the permit issued by CBRE
- The above can be uploaded as a document or app allows technicians to open the camera and take a snap of the document
- Note that there are changes expected to the PRA form in near future. SWMS/RAMS/JSA will be needed only for high risk works. If a high -risk job is selected, all regions except EMEA will have provision to request for a high-risk job permit through the same PRA form. EMEA will continue to upload the permit.
- If the job involves no high risk activity the technician can proceed to come on site and to perform the job. If a high risk activity is involved, the PRA form will need to be verified by the Facility Manager. Technician will receive a message *Site access requested successfully*.

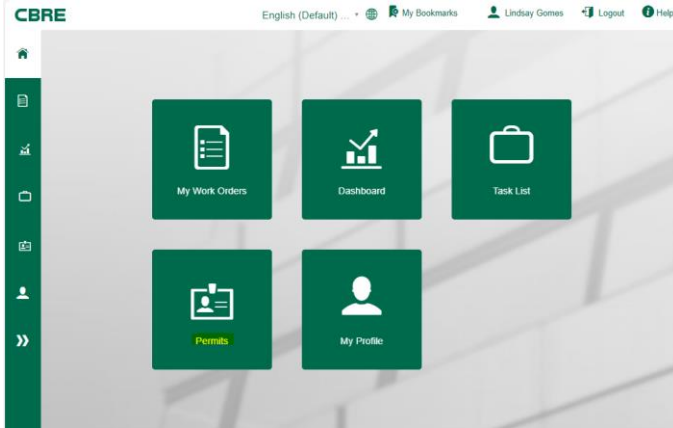


- Technician must wait for the permit to be approved. If this is not done faster considering the estimated completion date, please reach out to your local CBRE contact.

c. Permit Review and Approval | CBRE Facility Manager

CBRE Facility Managers (FM) will receive emails when a technician request for PRA approval. The FMs will log into the [CBRE Assure web portal](#) to review and act on the permit.

- FMs must go to the *Permits* button on their home page to review all permits pending for action.



- Work order, permit requestor and supplier company can be viewed from the list. FMs can select the work order number to see the work order details. By clicking *View* button against each permit they can review details provided by technician through PRA.

WO Number	Property	Requested By	Status	Action
C503578	Client: MGL Property Name: 50 Martin Place	Vendor: VERTIV (AUSTRALIA) PTY. LTD. Technician: Mohamed Gasham	Awaiting Permit Approval Submitted at: 27 Feb 2024 16:35	<a href="#">View</a>
P503120	Client: MGL Property Name: 50 Martin Place	Vendor: VERTIV (AUSTRALIA) PTY. LTD. Technician: Mohamed Gasham	Awaiting Permit Approval Submitted at: 04 Sep 2023 11:09	<a href="#">View</a>

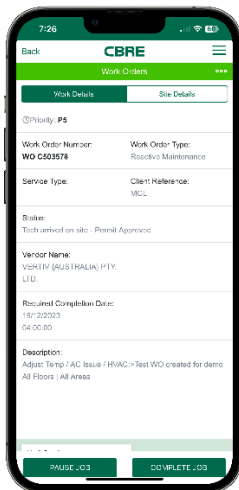
- FMs can give comments and either approve or reject the permit. Technician will be notified of the result.

d. Receiving PRA approved and completing the job | Supplier Worker/Technician

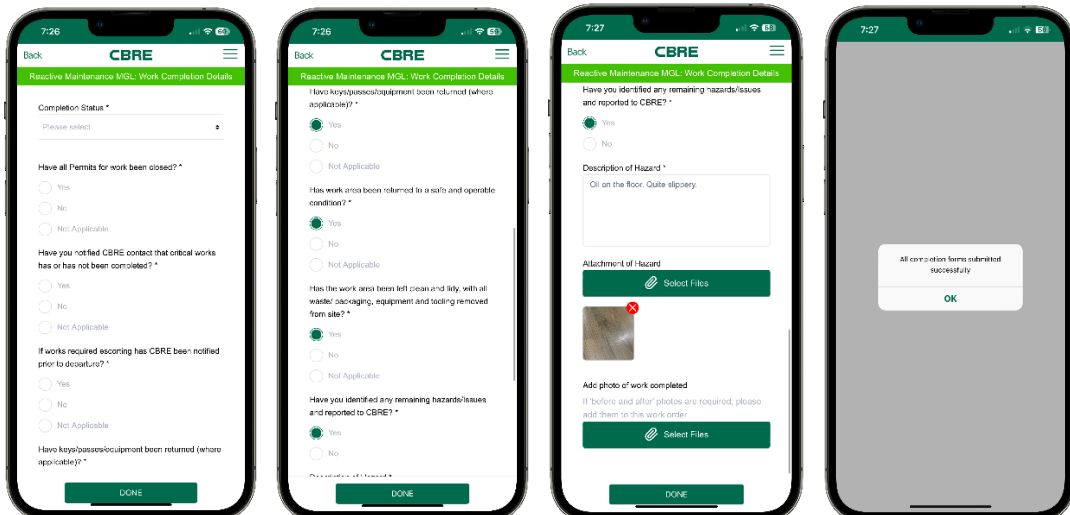
- Workers receive a notification on permit approval



- Worker can then proceed to perform and complete the job
- Worker can choose *Complete Job* option upon successful completion. Do note the Pause Job button doesn't pause the SLA. We do not recommend using the same. If there are reasons for delay, let your local FM team know.

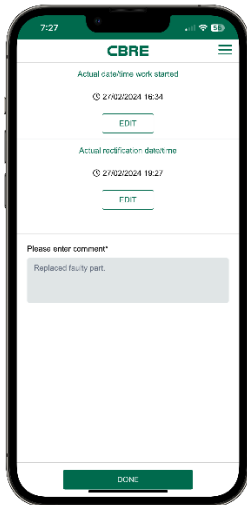


- To complete the job, worker must complete the close out form shown below.



If any issues or hazards are identified, workers must report them via this form. It is recommended to take pictures through the *Add photos of work completed* option.

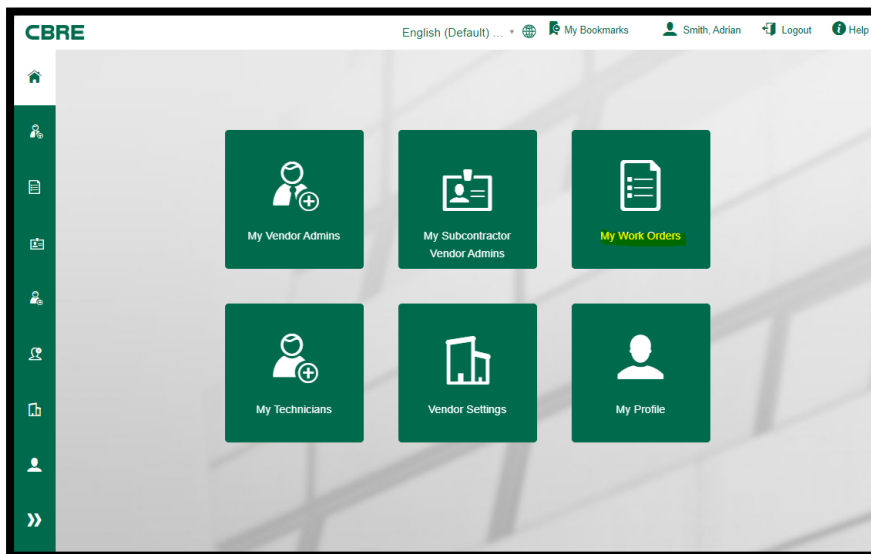
- Enter meaningful comments on what was done to fix the issue.



This completes a worker's action on the work order. The work order will be removed from workers *My Work Orders* list.

e. [Final supplier review of the job | Supplier Administrator](#)

- After the worker closes the work order, it comes back to supplier admin with *Admin Doc Required* status. This is when the admin reviews all entries made by technician. The work order can be viewed in the *My Work Orders* option upon login.



- Admin can search for a specific work order by selecting the *Filter Results* button and looking for a specific work order number in the filters.



CBRE English (Default) ... My Bookmarks Smith, Adrian Logout Help

## Work Order

CSV Filter Results Save Filter

Select Action  Archived Work Orders Results: 10

Submit

Priority	WO Completion Date/Time	ETA	Date Created	WO Number	WO Status	Client	Client Site Id	Location	Location Address	Location State
P14	-	No ETA presented	12/04/2023 16:16:28	VWO P502963	WO UNASSIGNED	MGL	MGLSYD800	50 Martin Place	50 Martin Place	Null Sydney 2000

CBRE English (Default) ... My Bookmarks Smith, Adrian Logout Help

WO Status: Select Status

Acceptance Status: Select Acceptance Status

Work Order Number: C503578

Client: MGL

Location Address: [Empty]

Location: [Empty]

Work Order Type: Select Work Order Type

Location State: Select a State

Site Contact Name: [Empty]

Vendor: Select Vendor

Site Contact Phone: [Empty]

Description: [Empty]

Service Type: [Empty]

Status: [Empty]

Start Date Created: [Empty]

End Date Created: [Empty]

Start Date Onsite: [Empty]

End Date Onsite: [Empty]

Start Date Completion: [Empty]

End Date Completion: [Empty]

Assignment Status: Select Assignment Status

Assigned To: Select Vendor/Technician

Priority: [Empty]

Region: Select a region

filter clear close

CBRE English (Default) ... My Bookmarks Smith, Adrian Logout Help

## Work Order

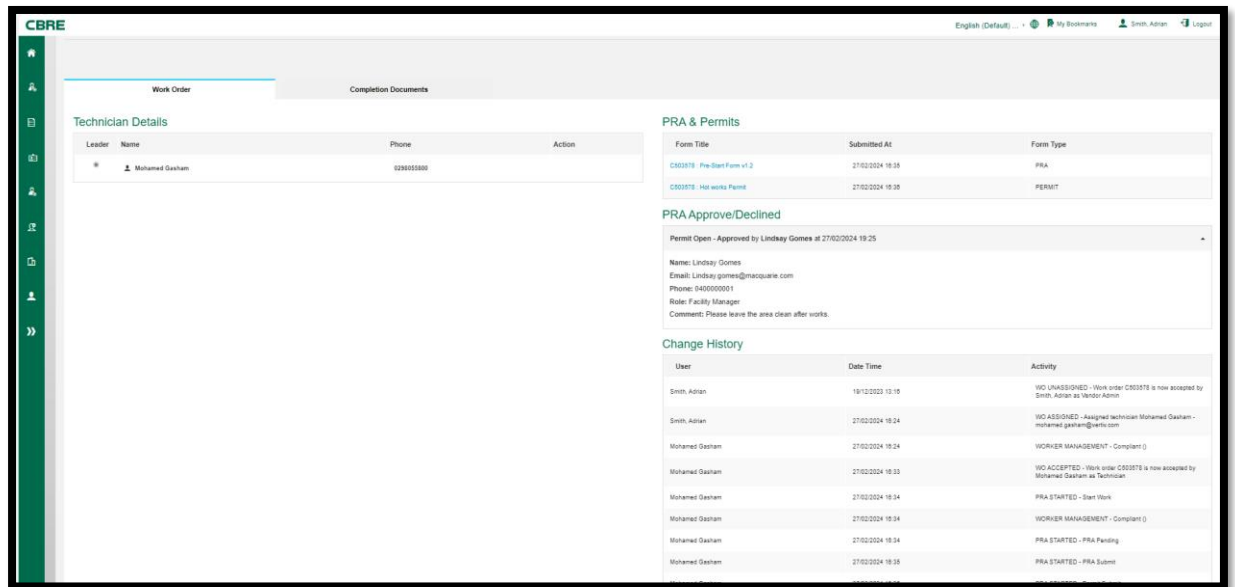
CSV Filter Results Save Filter

Select Action  Archived Work Orders Results: 10

Submit

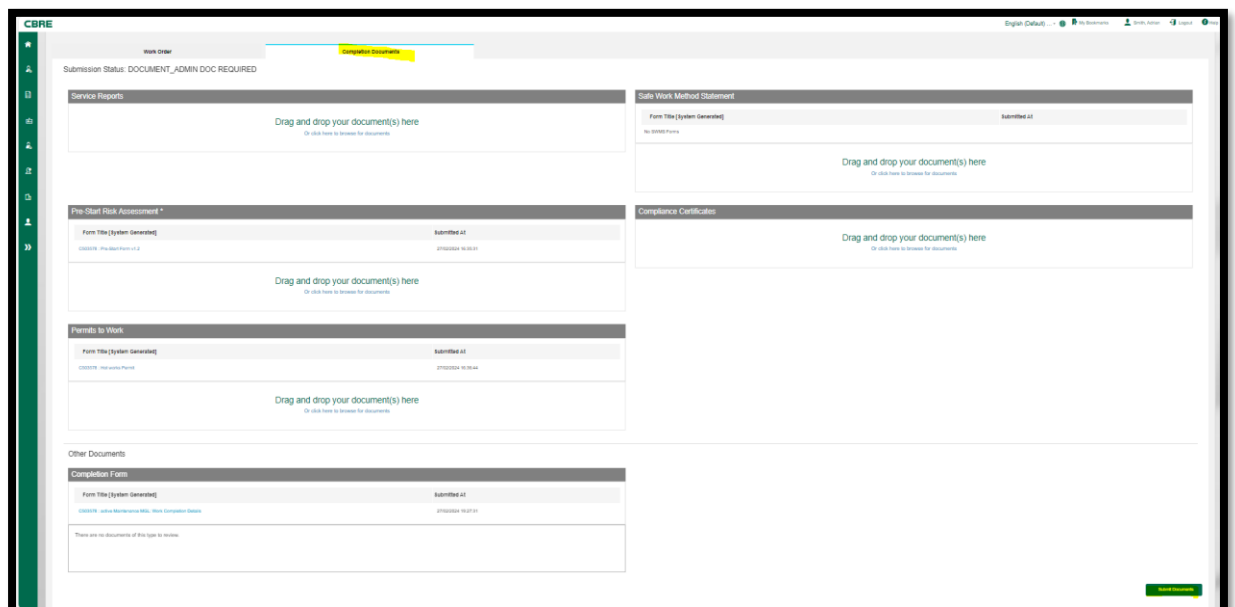
Priority	WO Completion Date/Time	ETA	Date Created	WO Number	WO Status	Client	Client Site Id	Location	Location Address	Location State	Wo Type (RM/PM)
P5	28/02/2024 06:27	27/02/2024 16:33	14/12/2023 20:06:30	C503578	ADMIN DOC REQUIRED	MGL	MGLSYD800	50 Martin Place	50 Martin Place	N/A Sydney	Reactive Maintenance

- The whole trail of activities on the work order can be reviewed by admin at the second half of the *work order details* screen.



- Admin must go to the *Completion Documents* section of the work order details page to upload any documents. Documents expected are service documents, SWMS/RAMS/JSA or photographs the admin thinks is necessary to track against this work order. After documents are uploaded admin can select *Submit Documents* at the right bottom corner of the screen.

If no documents are pending to be uploaded, admin can just select *Submit Documents* at the right bottom corner of the screen.

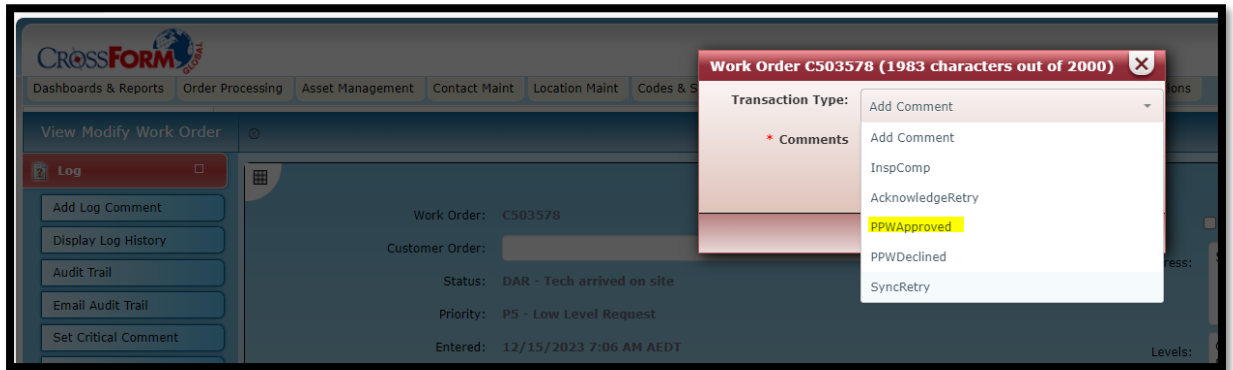


- This changes the Work Order's status to *Admin Doc Submitted*. This completes the admin's action on the work order (unless the FM team has follow up questions).

#### f. Final CBRE Review of the Work Order | CBRE Facility Manager

The last step of the process is with CBRE FMs to review and approve paperwork submitted by supplier admin and technician. This must be done in CBRE's Service Insight (SI) application.

- FM should review the job done and the work order in SI. If everything looks good FM can go to Log → Add log comment → Transaction Type: PPWApproved in SI.



This action will change the status of work order to Finalized and complete the process for a work order.

The screenshot shows the CBRE Work Order dashboard. It features a table with columns for Priority, WO Completion Date/Time, ETA, Date Created, WO Number, WO Status, Client, Client Site Id, Location, Location Address, Location State, and Wo Type (RM/PM). The row for work order C503578 is highlighted, showing a status of 'FINALISED'.

Priority	WO Completion Date/Time	ETA	Date Created	WO Number	WO Status	Client	Client Site Id	Location	Location Address	Location State	Wo Type (RM/PM)
P5	28/02/2024 06:27	27/02/2024 16:33	14/12/2023 20:06:30	C503578	FINALISED	MGL	MGLSYD800	50 Martin Place	50 Martin Place	N/A Sydney,	Reactive Maintenance

## 8. Support

For any support, suppliers or CBRE FMs can reach out to Damstra Support channels

- Phone: AU: 1300 722 801, NZ: 0800 722 801
- Email [support@damstra.zendesk.com](mailto:support@damstra.zendesk.com)

For escalations, reach out to your local CBRE contact.