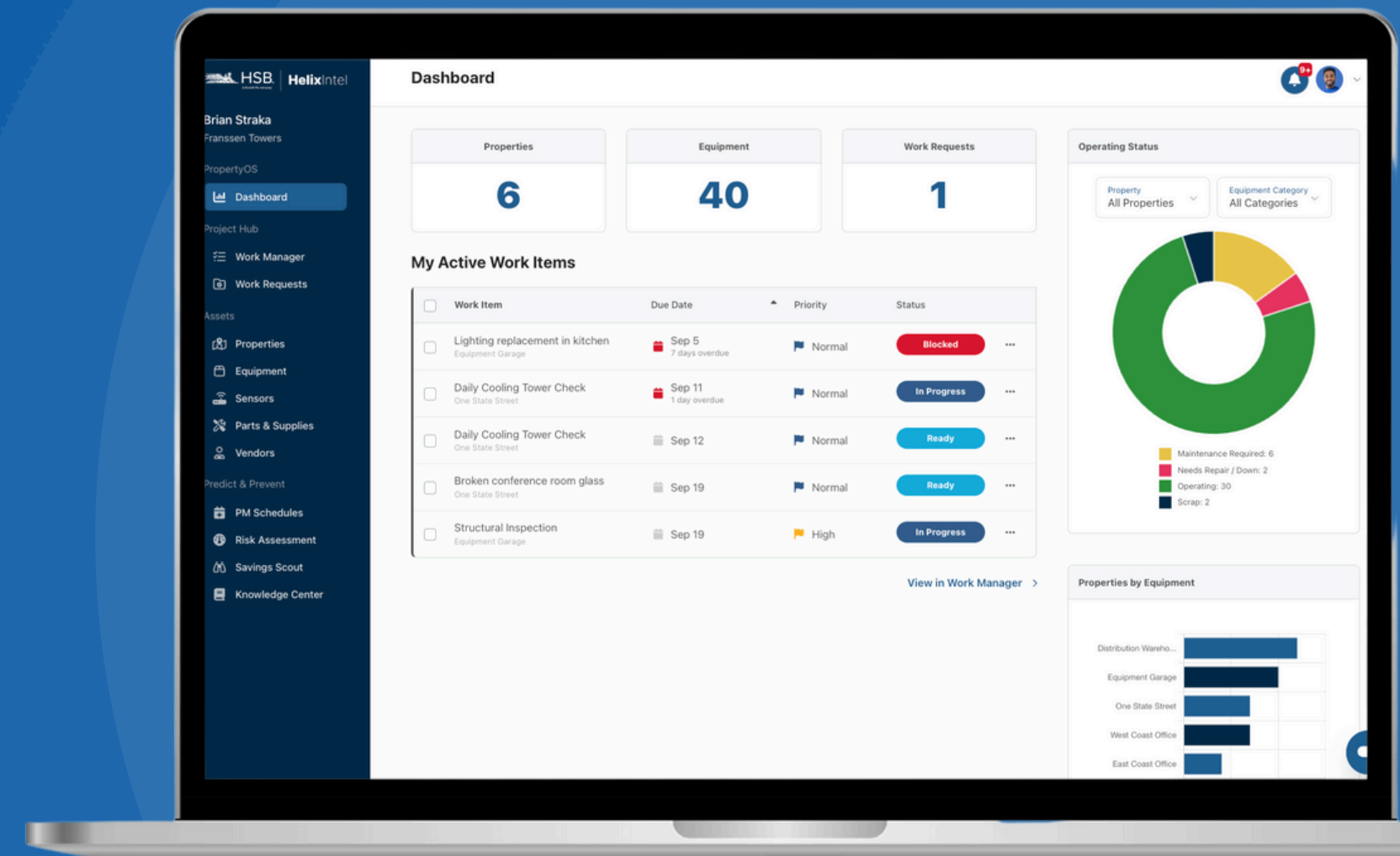


Quick Start Guide Getting Started with HelixIntel



Due Date	Priority	Status
Aug 12 1 days overdue	Normal	Blocked
Aug 13	Normal	Completed
Aug 19	Normal	In Progress
Sep 1	Normal	Ready



Inspect roof

This task was completed by Brian Straka on 09/12/2024. - Edit

Conduct a thorough inspection of the equipment garage roof to identify any signs of wear, damage or potential leaks. This inspection helps ensure the integrity of the roof and prevents costly repairs from worsening conditions. Pay special attention to the condition of roofing materials, flashing, and drainage systems.

Category: Not Set Work Type: Not Set

To Do (1)

Checklist (3/3)

- Inspect Roof Surface for Damage
- Examine Flashing and Seals
- Check Drainage Systems

Hide 3 Completed Items

Related To

Attachments

Comments:

- Brian Straka: @Ben Hauser hey did you see this?
- Ben Hauser: I did yesterday with PR Roof. The roof is no longer against the elements against the elements damage if not addressed. Due to the extent of the recommended as soon as possible repairs and ensure the...

Maintenance is hard. HelixIntel is here to make it easier.

Dive into the tools that will help you streamline daily operations and boost productivity. Whether you're just getting started or need a quick refresh, this guide will walk you through everything you need to hit the ground running and keep your workflow smooth and efficient.

Equipment

40 Items - View Archived Items

- Maintenance Required: 7
- Needs Repair/Down: 2
- Operating: 29
- Scrap: 2

9.19 Years

Air Dryer
Manufacturer: Kaiser
Model Number: KC800
Operating

Boiler #1
Manufacturer: Lochner
Model Number: FTXL
Operating

Boiler #2
Manufacturer: Lochner
Model Number: FTXL
Maintenance Required

Work Manager

7 Groups - View Archived Groups - View Closed Work Items

Table Calendar Search...

Default Work Group

Organize your work items however you want using groups.

Work Item	Assignee(s)	Due Date	Priority
Lighting replacement in kitchen	[User]	Sep 10 2 days overdue	Normal
Boiler is leaking	[User]	Sep 12	Urgent
Daily Cooling Tower Check	[User]	Sep 12	Normal
Reconfigure the office	[User]	Sep 13	Low
Patch parking lot potholes	[User]	Sep 28	Normal

Content

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1. Dashboard

Start Your Day Here

The Dashboard is your daily launchpad. Get a snapshot of everything that's happening across your operations. From here, you can:

- 1 **View Active Work Items:** See what's in progress, pending approval, or overdue.
- 2 **Quickly Access Key Areas:** Jump straight into tasks that need your attention.
- 3 **Monitor Performance:** Track key metrics to stay on top of your team's efficiency.

The dashboard interface includes a left sidebar with navigation options: Brian Straka (Franssen Towers), PropertyOS (Dashboard), Project Hub (Work Manager, Work Requests), Assets (Properties, Equipment, Sensors, Parts & Supplies, Vendors), and Predict & Prevent (PM Schedules, Risk Assessment, Savings Scout, Knowledge Center). The main content area features a 'Dashboard' header with three summary cards: Properties (6), Equipment (40), and Work Requests (1). Below these is a 'My Active Work Items' table with columns for Work Item, Due Date, Priority, and Status. The table lists items such as 'Lighting replacement in kitchen' (Blocked), 'Daily Cooling Tower Check' (In Progress), and 'Broken conference room glass' (Ready). A 'View in Work Manager' link is provided. To the right, an 'Operating Status' donut chart shows the distribution of equipment: Operating (30), Maintenance Required (6), Needs Repair / Down (2), and Scrap (2). At the bottom right, a 'Properties by Equipment' bar chart shows data for various locations like Distribution Warehouse, Equipment Garage, One State Street, West Coast Office, and East Coast Office.

2. Assets

Log Your Key Details

Keep your property and equipment information organized in the Assets section. This will help you:

- 1 **Centralize Information:** Store critical details about each asset in one place.
- 2 **Enhance Workflows:** Relate assets to relevant work orders for seamless tracking and reporting.
- 3 **Improve Maintenance:** Use asset details to inform preventive maintenance schedules.



Tip: Regularly update asset information to ensure accurate maintenance records.

Cooling Tower
One State Street

1 Photo gallery

2 + Add Photos

3 Basic Info

Basic Info	
Manufacturer	SPX
Model	Marley NC
Serial Number	46392010117489
Manufacture Date	2/8/2023
Equipment Category	HVAC
Location	One State Street
Condition	Excellent

Status: **Operating**

Edit Equipment

More Options

3. Work Requests

Review and Act

Work Requests is where you manage incoming requests. Here, you can:

- 1 **Approve or Decline Requests:** Quickly decide which requests should move forward.
- 2 **Adjust Request Details:** Modify due dates, priority levels, or add notes.
- 3 **Communicate with Requesters:** Leave comments or ask for additional information if needed.

The screenshot shows a 'Work Request' interface. At the top, there is a header with 'Group: Work Group', 'Work Request', and 'Copy Link'. Below this, there are fields for 'Assigned To' (with a user profile), 'Priority' (set to 'High'), and 'Due Date' (set to 'Sep 11, 2024' with a note '(1 day overdue)'). On the right side of the header, there are two buttons: 'Deny Request' and 'Approve Request'. A red circle with the number '1' is placed over the 'Approve Request' button.

The main content area is titled 'Water leak coming from bathroom in hallway A'. Below the title is a description: 'There's water dripping from the ceiling above the sink.' Below the description, there are two fields: 'Work Requested By:' with a user profile for 'Jackson Whitley' and 'Reviewer:' with a user profile for 'Rob Franssen'. Below these fields, there are two dropdown menus: 'Category: Water Leak' and 'Work Type: Not Set'. Below the dropdowns, there are two sections: '> To Do' and 'v Related To (1)'. Below these sections, there is a 'Location' section with a table:

Name	Address	City	State	Zip	
Mid-West Office Bldg	Main Street	Indianapolis	IN	46220	...

On the right side of the interface, there is a 'History' section with a 'View More' link. Below this, there is a comment from 'Brian Straka' dated '9/12/2024, 04:31 PM' that says '@Jackson Whitley Is this the men's or women's bathroom?'.

4. Work Manager

Handle Everything from Here

The Work Manager is your command center for all tasks. Use it to:

- 1 **Track Your Work:** See what's ready to be worked on, in progress, completed, or blocked.
- 2 **Prioritize Work:** Assign priority levels to ensure critical tasks are handled first.
- 3 **Collaborate with Your Team:** Add comments and notes to keep everyone in the loop.

The screenshot shows the HelixIntel Work Manager interface. On the left is a dark sidebar with the user's name (Brian Straka) and various navigation options. The main area displays two work groups. The first group, 'Default Work Group', has a progress bar at 0% complete and a table of work items. The second group, 'Roof Replacement - Garage', has a progress bar at 50% complete and a table of work items. Three callouts are present: '1' points to the status column of the first item in the first group; '2' points to the progress bar of the first group; '3' points to the 'Work Order' button of the first item in the first group.

Work Item	Assignee(s)	Due Date	Priority	Status
Lighting replacement in kitchen Garage	[User]	Sep 10 2 days overdue	Normal	Blocked
Boiler is leaking Garage	[RF]	Sep 12	Urgent	Completed
Daily Cooling Tower Check One State Street	[User]	Sep 12	Normal	Ready
Reconfigure the office Garage > Main Office	[RF]	Sep 13	Low	In Progress
Patch parking lot potholes Garage	[User]	Sep 28	Normal	Ready

Work Item	Assignee(s)	Due Date	Priority	Status
Inspect roof	[User]	Sep 12	Normal	Completed
Obtain 3 bids for roof replacement Garage	[RF]	Sep 19	High	Ready

5. Preventive Maintenance Schedules

Automate Your Preventive Efforts

Preventive Maintenance (PM) Schedules help you stay proactive. With this tool, you can:

- 1 **Reduce Manual Work:** Create schedules that automatically generate and assign PM work orders at regular intervals.
- 2 **Save Time:** Spend less time manually creating and assigning work.
- 3 **Stay Ahead on Maintenance:** Keep your equipment running smoothly with timely upkeep.



Tip: Review your schedules periodically to adjust for any changes in asset usage.

Work Manager
7 Groups · View Archived Groups · View Closed Work Items

▼ **Preventive Maintenance**
Boilers, HVAC, Roofs, Electrical 25% Complete · 1/4 Work Items

Work Item	Assignee(s)	Due Date	Priority	Status
Weekly Boiler Inspection One State Street	PM [2]	Aug 12 1 days overdue	Normal	Blocked
Daily Cooling Tower Check One State Street	PM	Aug 13	Normal	Completed
Weekly Boiler Inspection One State Street	PM	Aug 19	Normal	In Progress
Monthly Elevator Maintenance One State Street	PM	Sep 1	Normal	Ready

PM Schedules
3 Schedules · View Templates

Search... [Filters] [Assignees] [+ New]

PM Schedule	Schedule	Category	Assignees	Status
Daily Cooling Tower Check	Daily [3]	HVAC	[Assignees]	Active
Monthly Elevator Maintenance	Monthly	Elevator	[Assignees]	Active
Weekly Boiler Inspection	Weekly	Boilers	[Assignees]	Active

6. Templates

Standardize Your Tasks

Templates help you maintain consistency across your operations. They allow you to:

- 1 **Create Standardized Tasks:** Build templates for common tasks to save time.
- 2 **Ensure Uniformity:** Apply the same standards across different teams or locations.
- 3 **Streamline Workflows:** Simplify the task creation process for routine operations.

The screenshot shows a task management interface with a search bar, 'Filters', 'Assignees', and '+ New' buttons. A dropdown menu is open from the '+ New' button, listing options: 'Task', 'Task from Template' (highlighted with a red arrow), 'Work Request', 'PM Schedule', and 'Group'. Below the menu is a table of tasks with columns for assignee(s), due date, priority, and status.

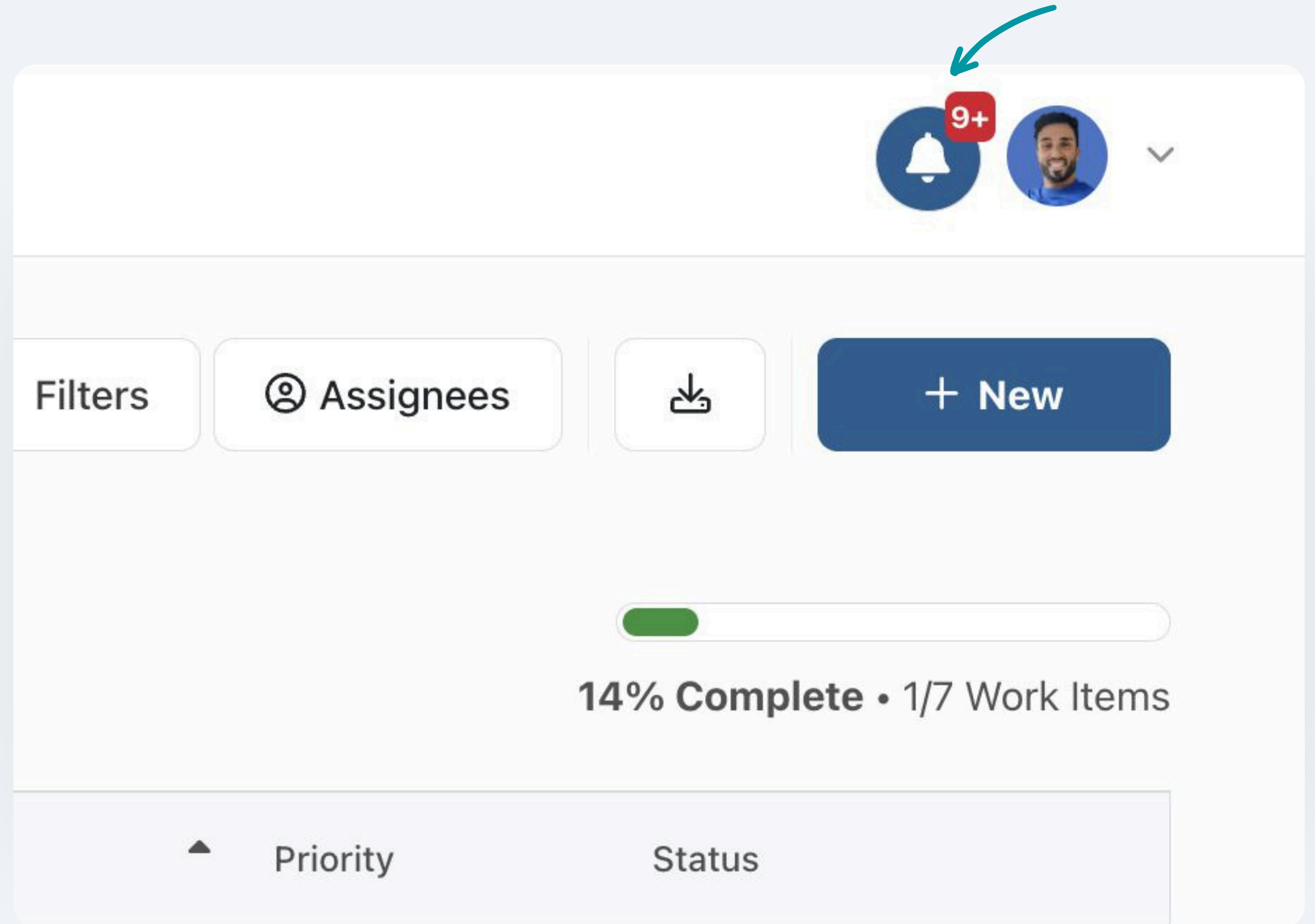
Assignee(s)	Due Date	Priority	Status
	Jan 6, 2025	Normal	Ready
	Sep 30	High	Ready
	Sep 7 5 days overdue	Normal	Blocked

7. Notifications

Never Miss an Update

Notifications keep you informed about what matters most. You can:

- 1 **Choose Your Channels:** Select how you want to receive alerts – in-app, email, SMS, or mobile.
- 2 **Customize Alerts:** Set preferences for the types of notifications you receive.





Need Help?

If you have questions or need further assistance, use the in-app chat support or reach out to your Account Manager.



HelixIntel



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