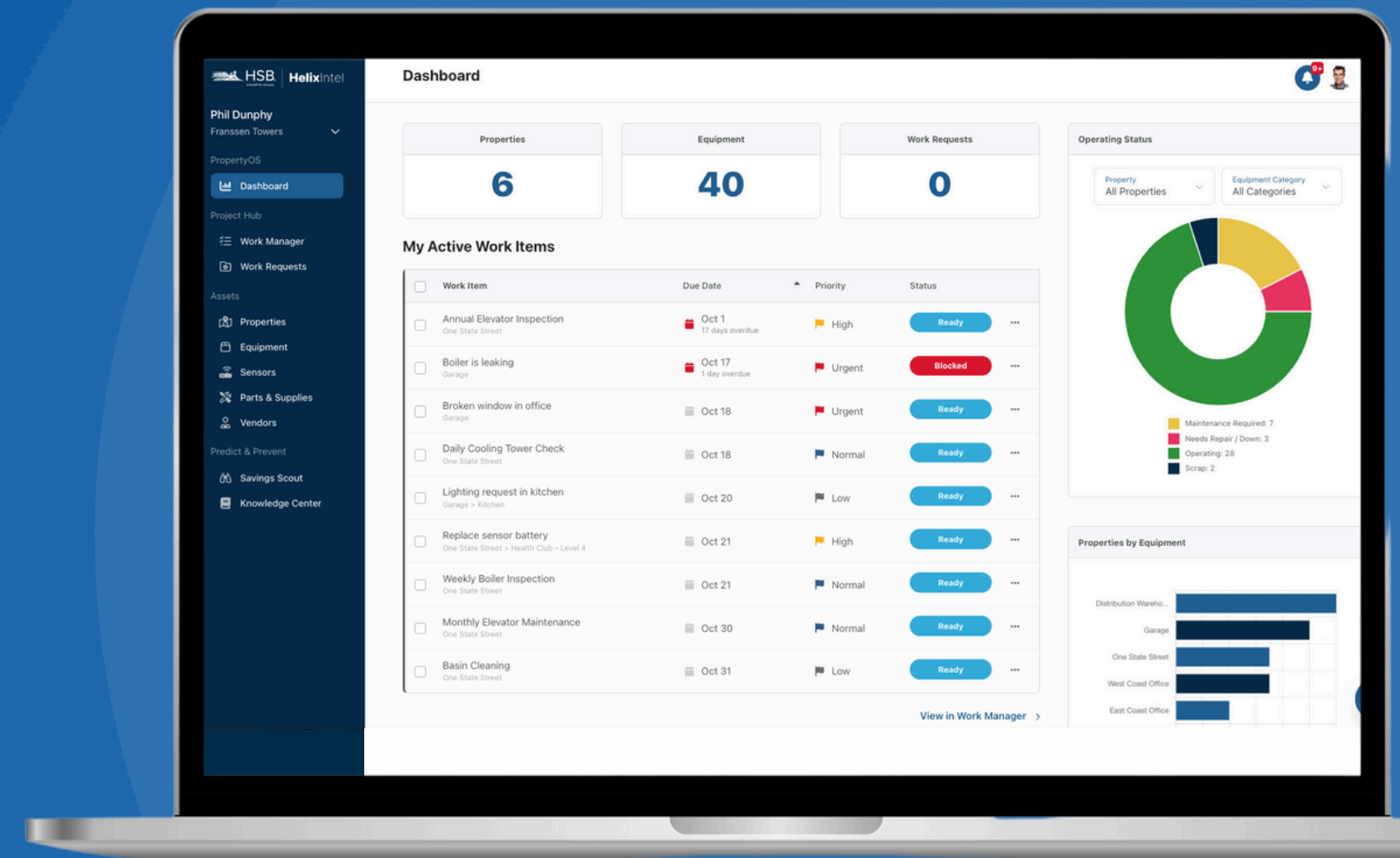


# Quick Help Guide Getting Started with Work Order Management



25% Complete • 1/4 Work Items

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



Group: Roof Replacement - Garage Task Copy Link (ID)

Assigned To: Priority: Normal Due Date: Sep 12, 2024

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

### Inspect roof

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**

Time Tracked: 01:30:00

The roof is no longer against the elements damage if not addressed. Due to the extent of the recommended as soon repairs and ensure the b

Brian Straka @Ben Hauser hey did you well?

Ben Hauser I did yesterday with PR Roofr the end of the week. I will call and quote.

View More

Brian Straka Awesome, thank you!

Add a Comment...

# 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.

HSB HelixIntel

Brian Straka  
Franssen Towers  
PropertyOS  
Dashboard  
Work Manager  
Work Requests

### Equipment

40 Items - View Archived Items

Maintenance Required: 7  
Needs Repair/Down: 2  
Operating: 29  
Spare: 2

WSPC Over Administration  
Building & Maintenance  
Kitchen & Foodservice  
Building Services  
Fitness Equipment

9.19 Years

Air Dryer  
Manufacturer: Kaiser  
Model Number: KC800  
Operating

Boiler #1  
Manufacturer: Lochinvar  
Model Number: FTXL  
Operating

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

HSB HelixIntel

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Franssen Towers  
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Work Requests

### Work Manager

7 Groups - View Archived Groups - View Closed Work Items

Table Calendar Search...

Filters Assignees

▼ Default Work Group  
Organize your work items however you want using groups.

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

+ New

Placement - Garage  
Assignee(s) Due Date  
Sep 12

# 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, what's overdue, and more.
- 2 **Quickly Access Key Areas:** Jump straight into tasks that need your attention.

The dashboard provides a comprehensive overview of operations. Key metrics include 6 Properties, 40 Equipment, and 1 Work Request. The 'My Active Work Items' table lists tasks such as 'Lighting replacement in kitchen' (Blocked), 'Daily Cooling Tower Check' (In Progress), and 'Structural Inspection' (In Progress). The 'Operating Status' donut chart shows 30 Operating, 6 Maintenance Required, 2 Needs Repair / Down, and 2 Scrap. The 'Properties by Equipment' bar chart shows distribution across various locations like Distribution Warehouse, Equipment Garage, and One State Street.

Properties	Equipment	Work Requests
6	40	1

Work Item	Due Date	Priority	Status
Lighting replacement in kitchen Equipment Garage	Sep 5 7 days overdue	Normal	Blocked
Daily Cooling Tower Check One State Street	Sep 11 1 day overdue	Normal	In Progress
Daily Cooling Tower Check One State Street	Sep 12	Normal	Ready
Broken conference room glass One State Street	Sep 19	Normal	Ready
Structural Inspection Equipment Garage	Sep 19	High	In Progress

**Operating Status Legend:**

- Maintenance Required: 6
- Needs Repair / Down: 2
- Operating: 30
- Scrap: 2

**Properties by Equipment:**

Property	Count
Distribution Warehouse	~15
Equipment Garage	~10
One State Street	~8
West Coast Office	~5
East Coast Office	~3

# 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.



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

**Cooling Tower**  
One State Street

**1** (points to the main image area)

**2** (points to the 'Add Photos' button)

**Info** | Active Work Items | Completed Work Items | PM Schedules | Parts | Attachments

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**

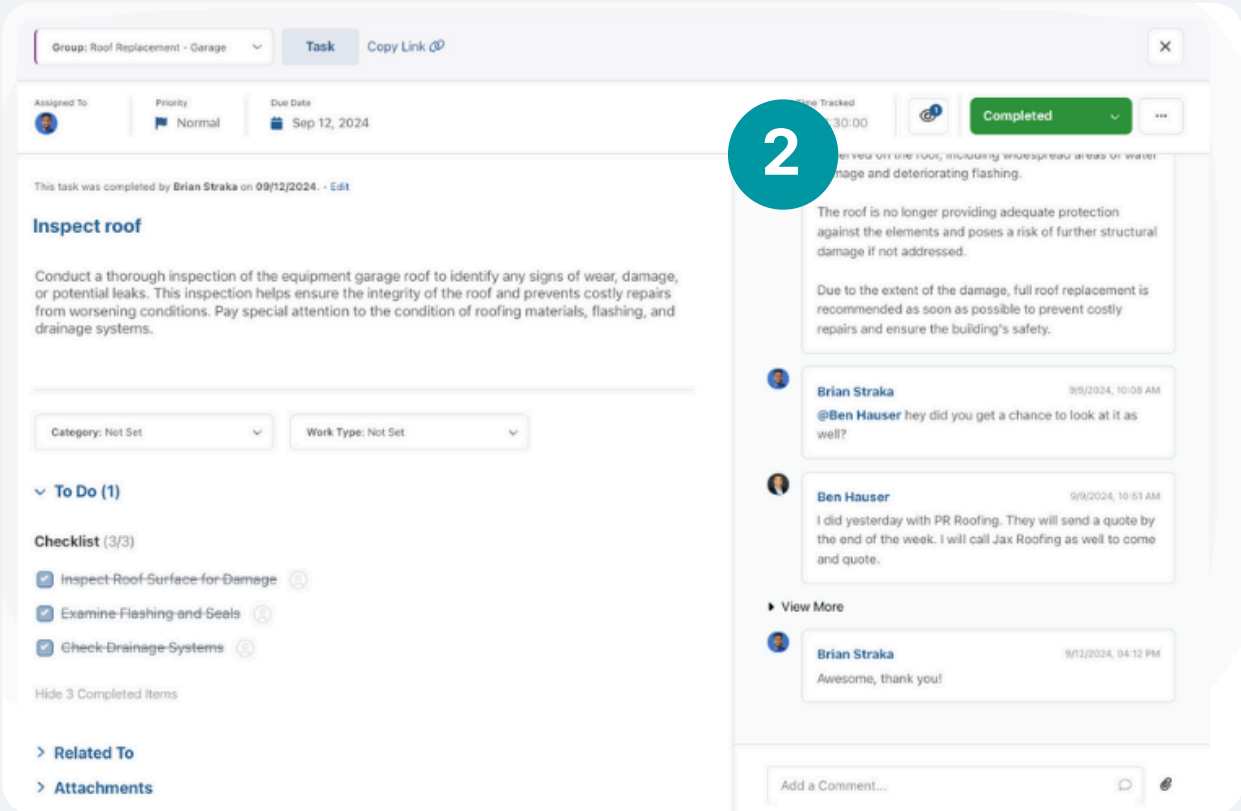
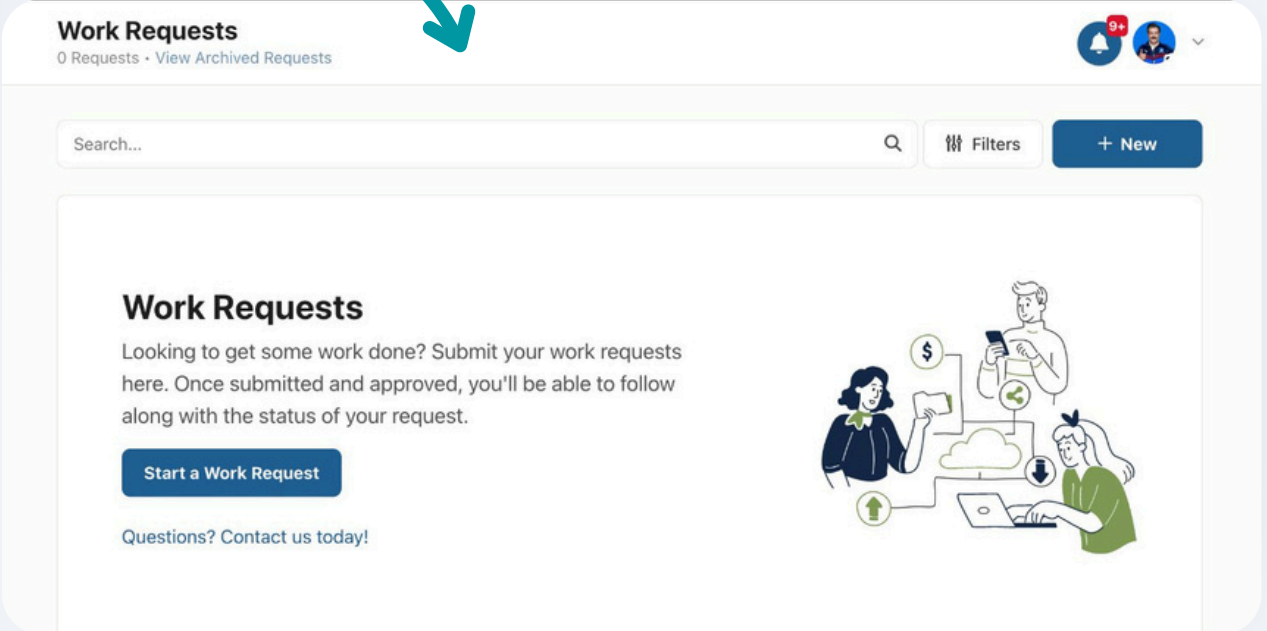
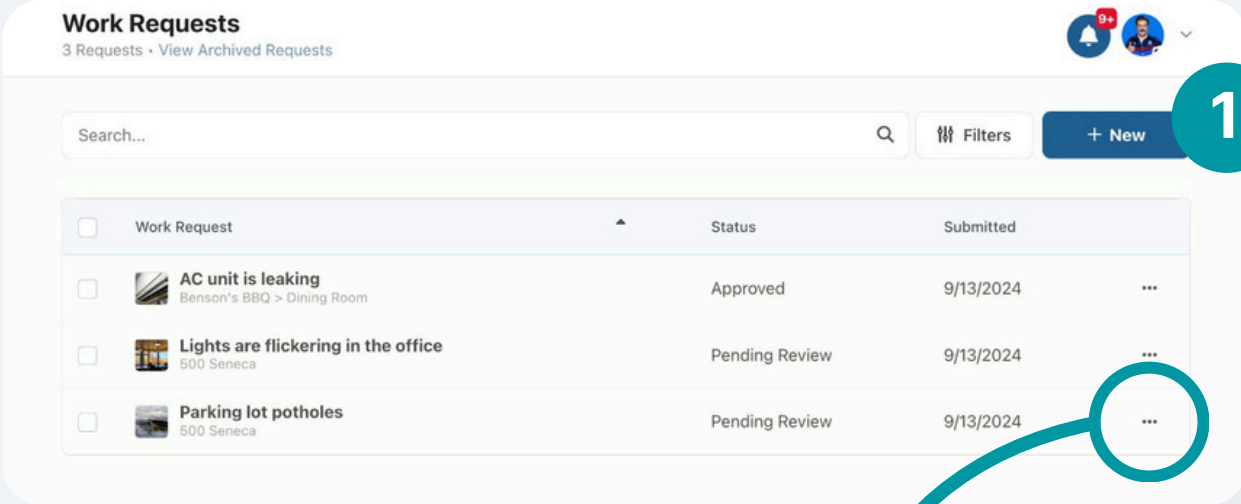
Buttons: Edit Equipment, More Options

# 3. Work Requests

## Track Your Requests

Work Requests is where you go to access your work requests. You can:

- 1 Submit Work Requests:** Submit any work requests (e.g., maintenance needs) and track their progress.
  
- 2 Communicate with Your Team:** Leave comments or ask for additional information if needed.



# 4. Work Manager

## Handle Everything from Here

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

- 1 **Track Your Work:** See what's ready to be worked on, in progress, completed, or blocked.
- 2 **Collaborate with Your Team:** Add comments to keep everyone in the loop and communicate in an efficient, easy way.

The screenshot displays the HelixIntel Work Manager interface. On the left is a dark blue sidebar with the user's name 'Brian Straka' and various navigation options like 'Dashboard', 'Work Manager', 'Work Requests', and 'Assets'. The main area is titled 'Work Manager' and shows a list of work items under two groups: 'Default Work Group' and 'Roof Replacement - Garage'. Each work item row includes a checkbox, the item name, location, assignee(s), due date, priority, and status. Callout '1' points to the 'Blocked' status of the first item, and callout '2' points to the 'Assignee(s)' column header.

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

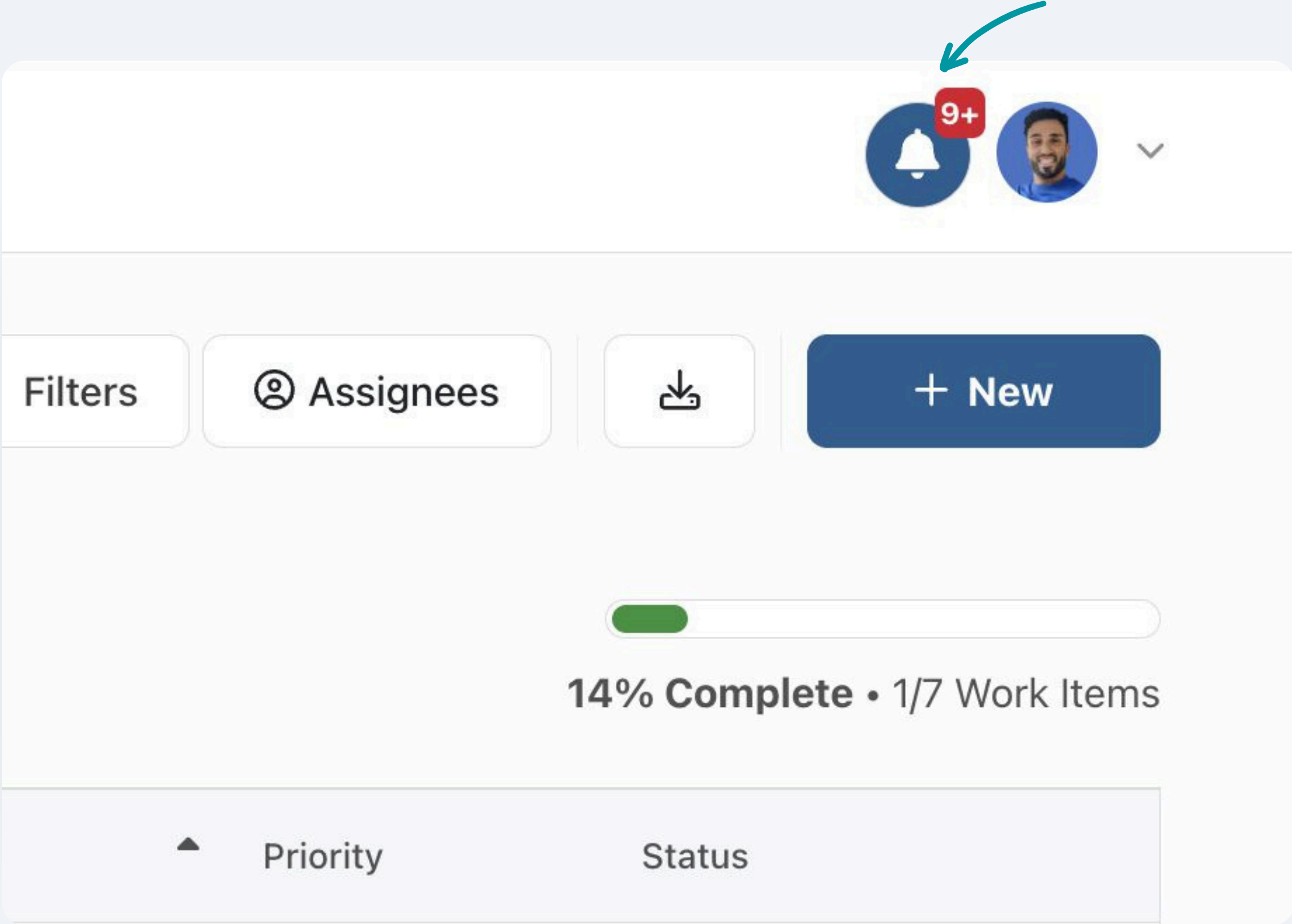
Work Item	Assignee(s)	Due Date	Priority	Status
Inspect roof	[Assignee]	Sep 12	Normal	Completed
Obtain 3 bids for roof replacement Garage	[Assignee]	Sep 19	High	Ready

# 5. Notifications

## Stay in the Know

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.



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