

WIMS -Engage VT-Partner's User Guide

What is Engage?

Engage is a self-service portal solution that provides a user-friendly, fully integrated means of communication between Buildings & General Services and our customers to provide the highest level of service from maintenance repairs to facility use requests, BGS is here to help.

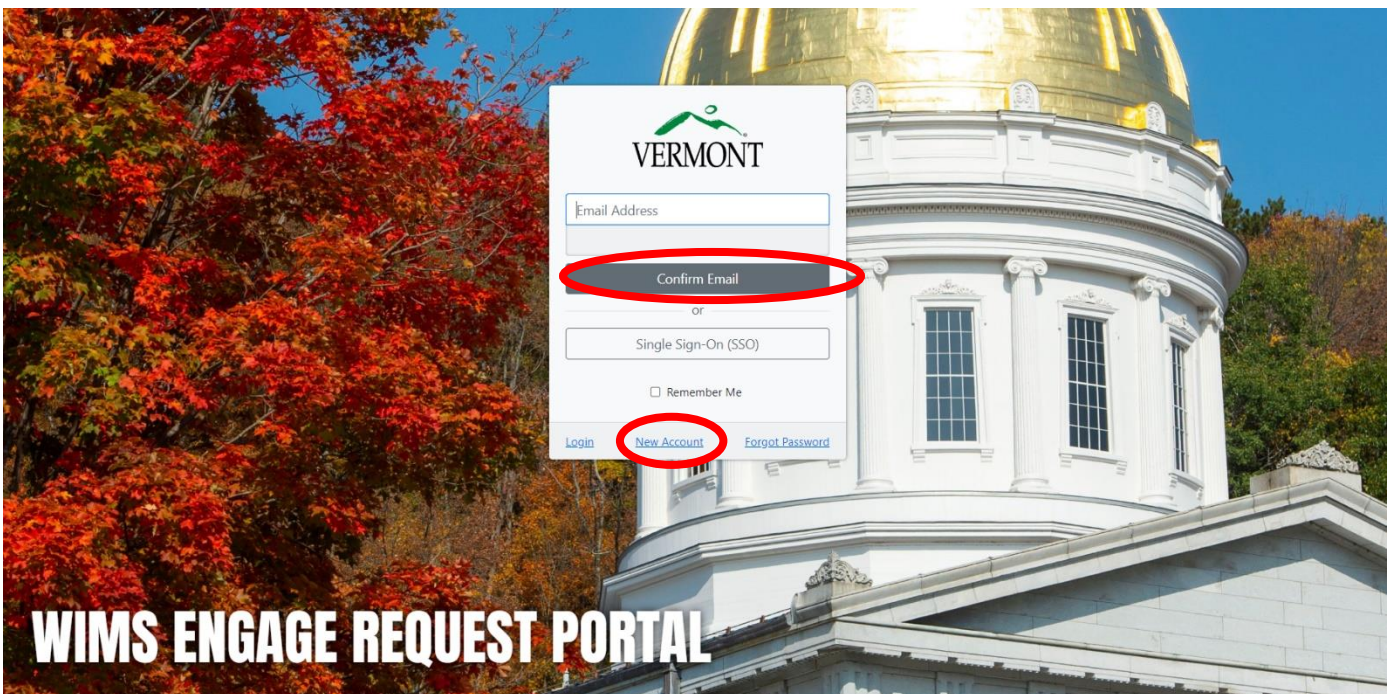
How to navigate in Engage

Engage Portal link:

<https://sov.assetworks.cloud/engage>

To set up your new user account follow these instructions:

1. Enter your email and click “New Account”.

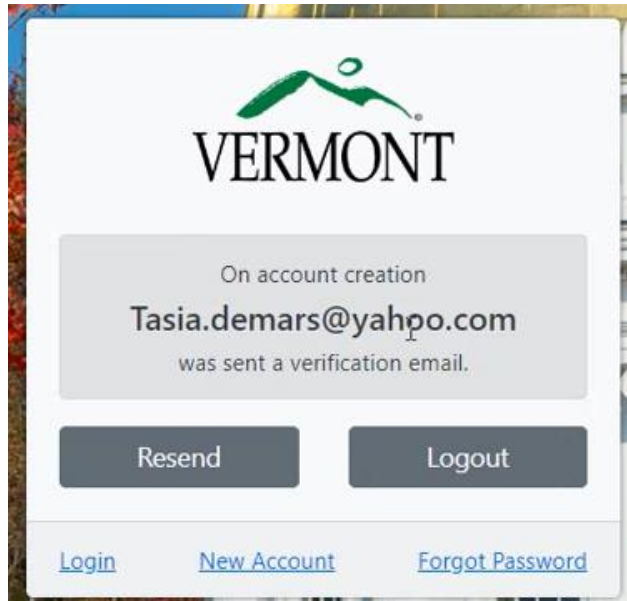


2. Complete the form and click "Create User".

A registration form with the following fields and options:

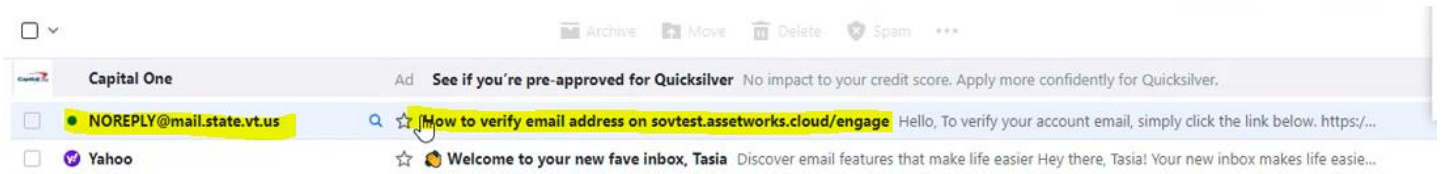
- First Name: Tasia
- Last Name: Demars
- Email: Tasia.demars@yahoo.com
- Notification settings: Last notification 01/25/2023
- Email preferences: Task Assignment, Workflow Activity, AiM Status Updates, Comments (all unchecked)
- Password and Confirm password fields (empty)
- Blue "Create User" button
- Footer links: Login, New Account, Forgot Password

3. Next, go to your email and approve your request.

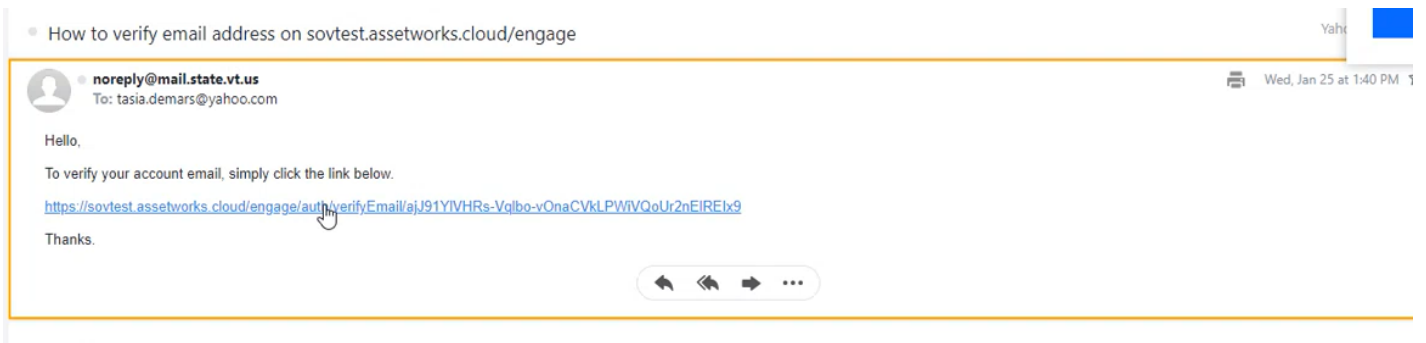


3. Navigate to your email and open the one that was sent.

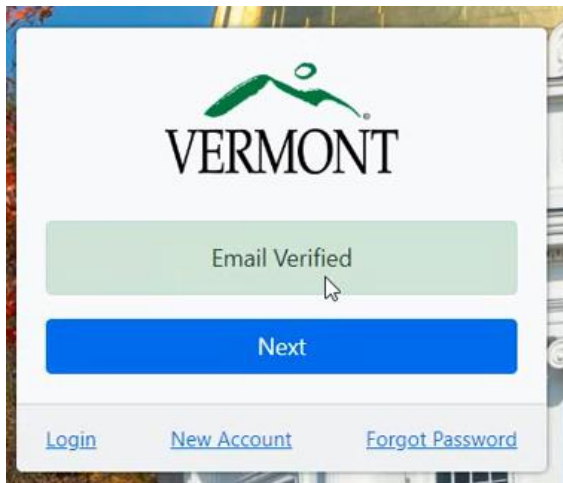
Note: If you don't see the verification email in your regular inbox, check your junk folder.



5. Click the link to verify your account.





6. Congratulation! You have been verified in the system.



Engage Home Page

Please note, you will need to submit a request using the “Profile Request – VT Partners” tile to complete your profile and gain access to the rest of the system.

If you only need to submit a request to use State Facilities, then disregard the profile setup and select the “State Facility Use” tile and begin your request.

 <p>PARTNERS</p>	
<p>Profile Request - VT Partners Complete this form to finalize your profile and gain additional access to the system.</p>	<p>State Facility Use Use this form to submit RUSF (Request Use of State Facility) requests for any state-owned facility or grounds.</p>

Once your profile is complete, your home page will appear like the one shown below,



Each category has been defined by individual icon colors.



Toolbar Navigation

Home

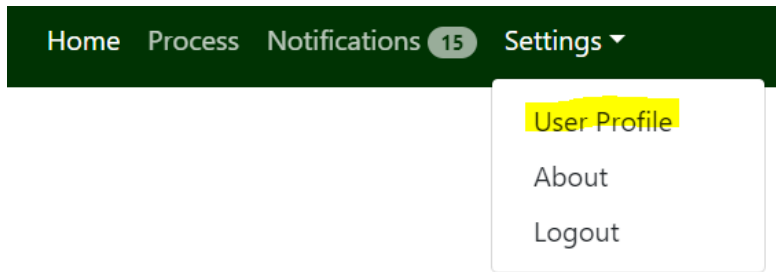
Select the home page to navigate back to your main screen.



User Profile

Under your user profile you can add your profile picture and turn your notifications on or off.

1. Click on the icon to add or delete your profile picture.
Click the check box to turn on or off your work order notifications.
2. It is highly recommended that you add your phone number to your profile since it's a required field in the system.



User Profile

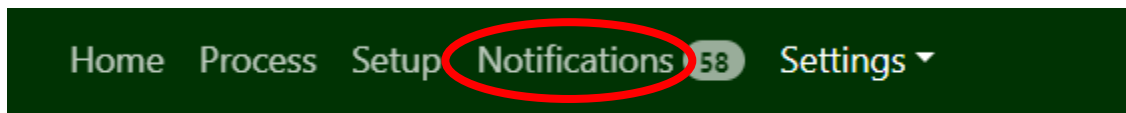
The User Profile page is divided into three main sections:

- General Settings:** Features a circular profile picture placeholder with the initials "DK". Below the picture is the name "Demars Kari" and two buttons: "Deactivate account" and "Change Password". An "Edit" button is in the top right corner.
- Notifications:** A section titled "I would like to receive email notifications for the following events:" with a list of checkboxes: Task Assignment, Workflow Activity, AIM Status Updates, and Comments. The "Comments" checkbox is circled in red. An "Edit" button is in the top right corner.
- Phone:** A table with an "Add" button in the top right corner. The table has four columns: Phone Number, Phone Format, Type, and Remove.

Phone Number	Phone Format	Type	Remove
(802) 535-4549	United States	Mobile	

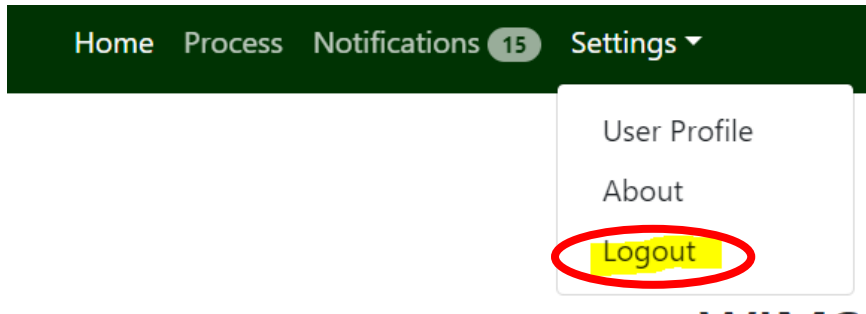
Notifications

You will receive notifications here if you have a new comment or are watching Engage Requests.



Logout

You may logout by clicking “Logout”.



Search Field

For your convenience, the search field located at the top of the home page will assist you when selecting the most relevant tile.



VERMONT WIMS Engage Request Portal

Routine Maintenance



QWO / After Hours
Quick work order (QWO) for technicians to submit a normal or emergency work order.



Door Lock and Key
Door repairs, locks or key issues.



Plumbing
Plumbing services or repairs to pipes, sinks, sprinklers or toilets.



Carpentry
Select this tile to submit request to hang pictures, structural repairs

How to submit a work order request in Engage

- Anything with an asterisk is a mandatory field.
- If you are unsure of the question, click the “Help” button in blue.
- If you need additional assistance, Select the **Customer Service -VT Partner’s** <https://sov.assetworks.cloud/engage/request?sectionId=tLwQywwc7MmnZiR&templateId=454gm7Fp6Qcydiqzu> Tile. The link may take a second to load.

Select the tile that best fits your request. If you are unsure of which tile to select, use the search field on the home page.

Home Process Setup Notifications 58 Settings

Request Templates

VERMONT
WIMS Engage Request Portal

Routine Maintenance

QWO / After Hours
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The first page will default your personal information in for you. If your information is incorrect, please Select the **Customer Service – VT Partner** <https://sov.assetworks.cloud/engage/request?sectionId=tLwQywwc7MmnZiR&templateId=454gm7Fp6Qcydiqzu> tile for assistance.

If you wish to submit a work order for another individual, please use the alternate option.

Contact Information

Is there an alternate contact for this request?

Yes

No

Contact Name: *

Demars Kari

Contact Phone: * [Help](#)

(802) 535-4549

Contact Email: *

Kari.Demars@vermont.gov

Cancel [Next >](#)

Continue to fill in the mandatory fields for the next 1-3 pages.

If you need to go back on your form, use the “Previous” button on the bottom. If you have any documents or pictures to attached that are relivent to the request you can attach them here.

Attach helpful pictures, documents or videos.

Drop Files To Attach Or:

[Browse](#)

Please click the [Review](#) button to be sure we've captured all of the correct information.

Remember to click the [Submit](#) button at the bottom of the screen to submit your request!

Cancel [< Previous](#) [Review](#)

Once you're satisfied with your selections, select the review button on the bottom of your page.

Attach helpful pictures, documents or videos.

Drop Files To Attach Or:

Browse

Please click the **Review** button to be sure we've captured all of the correct information.

Remember to click the Submit button at the bottom of the screen to submit your request!

Cancel < Previous Review

This screenshot shows a form interface. At the top, there is a section for attaching files with a dashed border and a 'Browse' button. Below this is a text box with instructions: 'Please click the Review button to be sure we've captured all of the correct information.' and a bold reminder: 'Remember to click the Submit button at the bottom of the screen to submit your request!'. At the bottom, there is a navigation bar with a 'Cancel' button on the left and two blue buttons: '< Previous' and 'Review'. The 'Review' button is circled in red.

The final page gives you one last review before submitting. Once you are completely satisfied with your request go ahead and select the "Submit" button.

Final Review

Attach helpful pictures, documents or videos.

Drop Files To Attach Or:

Browse

Cancel < Previous Submit

This screenshot shows the final review page. It has the same file upload section as the previous page. The navigation bar at the bottom has a 'Cancel' button on the left and two blue buttons: '< Previous' and 'Submit'. The 'Submit' button is circled in red.

Process

The process screen allows you to view the work orders you have submitted.

1. Select “Process” on the toolbar.
2. Click “Your Open Requests”
3. Find your open requests on the right.

Home Process Setup Notifications 58 Settings

Processes

Awaiting Your Review 3 Filter Your Open Requests Clear Stop Watching 1 of 20

Your Open Requests 51

Yesterday

STATE FACILITY USE REQUEST - 06018 - STA... 01/05/2023
21161 Demars Kari 02:12 PM

Workflow

Work Order Created since 01/05/2023 02:12 PM

Details Attachments 0 Approvals Comments 0 AiM

State Facility User Request
State Facility Request

Engage Request Number

This number is used to search for a specific work order in Operate. Customers can reference this number when referring to a specific work order.

Home Process Setup Notifications 58 Settings

Processes

Awaiting Your Review 3 Filter Your Open Requests Clear Stop Watching 1 of 20

Your Open Requests 51

Yesterday

STATE FACILITY USE REQUEST - 06018 - STA... 01/05/2023
21161 Demars Kari 02:12 PM

Workflow

Comments

1. Additional information can be shared by adding a comment to any request.
2. You may also notify others by adding them in the comment by using their email.
Example: @Jane.Doe

STATE FACILITY USE REQUEST - 06018 - STA... 01/05/2023
21161 Demars Kari 02:12 PM

Workflow

Work Order Created since 01/05/2023 02:12 PM

Details Attachments **0** Approvals **0** **Comments 0** AiM



Click to enter comment

Watching

If you wish to receive notification for a specific request click "Watching". To stop watching just click it again and "Watch" should appear. You will find a watch list in the column on the left.

Home Process Setup Notifications **53** Settings ▾

Awaiting Your Review 3	Filter All Requests Clear	Start Watching
Your Open Requests 51	21141 Demars Kari 01/03/2023	Move Request 21134 Thomas DeForge
Your Watch List	Customer Service 21140 Demars Kari 01/03/2023	
Your Closed Requests	Customer Service 21139 Demars Kari 01/03/2023	
All Requests	Customer Service 21138 Demars Kari 01/03/2023	

Workflow
Generated since 12/30/2022

Details Attachments **1** An