

WIMS -Engage

VT-Partner's (non-@vermont.gov) User Guide

What is Engage?

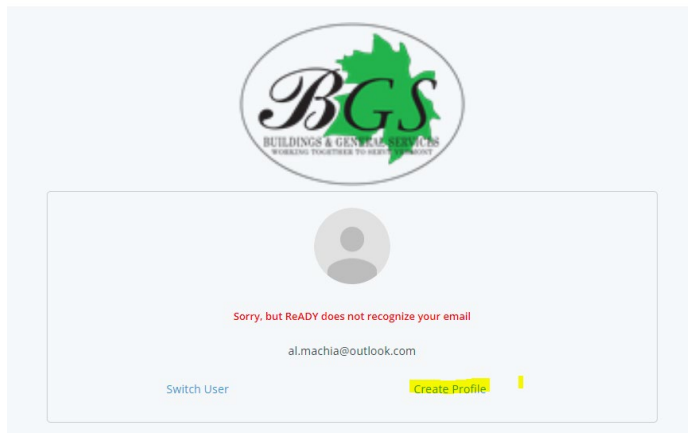
Engage is a self-service portal solution that provides a user-friendly, fully integrated means of communication between Buildings & General Services and our customers to provide the highest level of service from maintenance repairs to facility use requests, BGS is here to help.

How to navigate in Engage

Engage Portal link:

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

1. Enter your email and click continue.
2. The message will appear Sorry, but ReADY does not recognize your email
3. Create Profile



4. Fill in the create user fields and select Create User
5. You will need to go into your email and verify.
Note: If you don't see the verification email in your regular inbox, check your junk folder.
6. BGS will review the request and comment once the account has been created.
7. Log into Engage



Please enter your email to continue

Continue

OR



Sign in with SSO

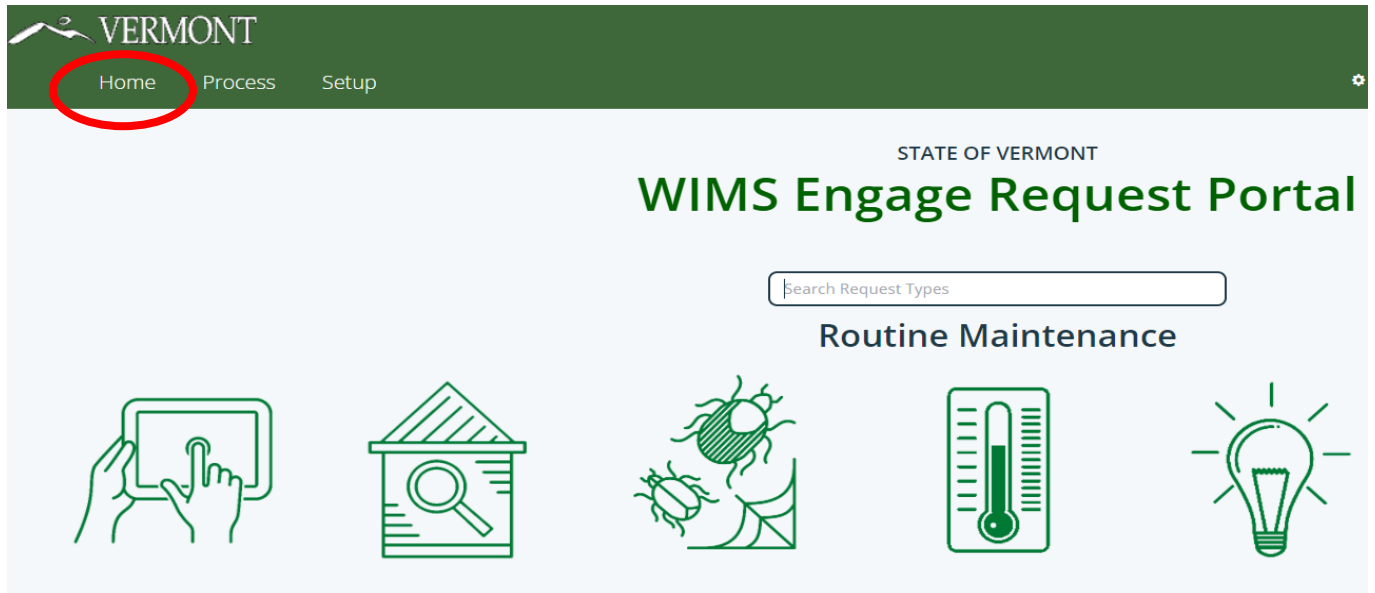
Engage Home Page

The screenshot shows the 'WIMS Engage Request Portal' for the State of Vermont. At the top, there is a dark green header with the Vermont state logo and the text 'VERMONT'. Below the header, a navigation bar contains links for 'Home', 'Process', and 'Setup' on the left, and 'System Configuration', 'User Profile', 'Notifications', 'About', and 'Logout' on the right. The main content area features the title 'STATE OF VERMONT WIMS Engage Request Portal' and a search bar labeled 'Search Request Types'. Underneath, a section titled 'Routine Maintenance' displays a grid of 14 icons representing different request types: QWO / After Hours, BRIN, Pest Control, HVAC, Electrical, Plumbing, Elevator, and seven other categories represented by icons of a toolbox, a door lock, a building, a calendar, a bucket and spray bottle, and a shield with a lock.

Toolbar Navigation

Home

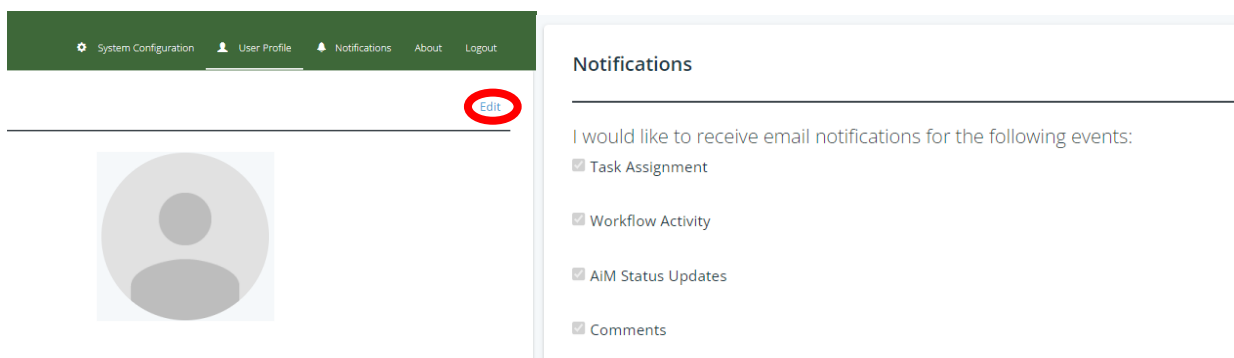
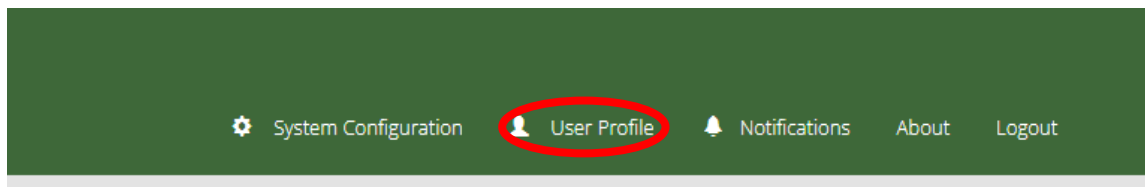
Select the home page to navigate back to your main screen.



User Profile

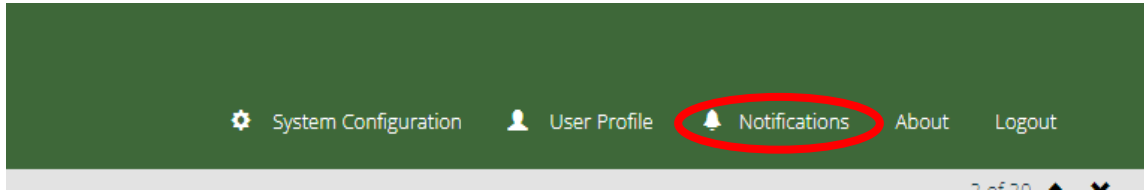
Under your user profile you can add your profile picture and turn your notifications on or off.

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.



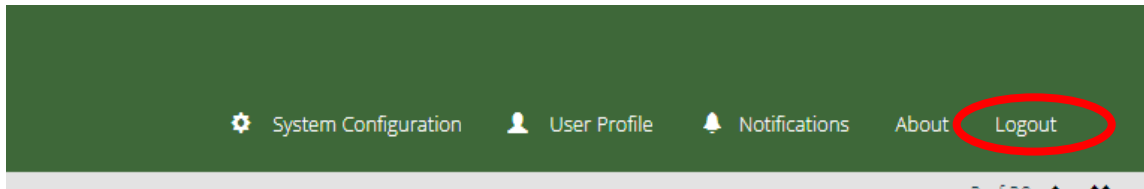
Notifications

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



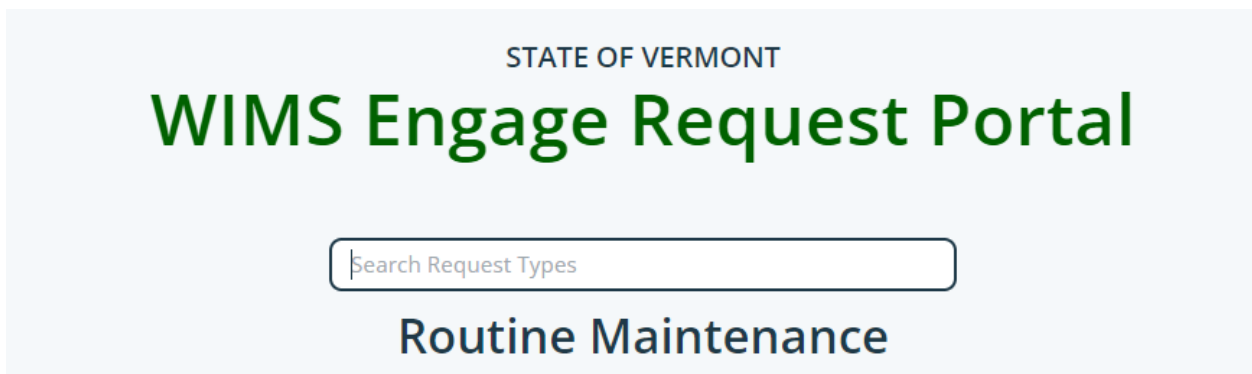
Logout

You may logout by clicking “Logout”.



Search Field

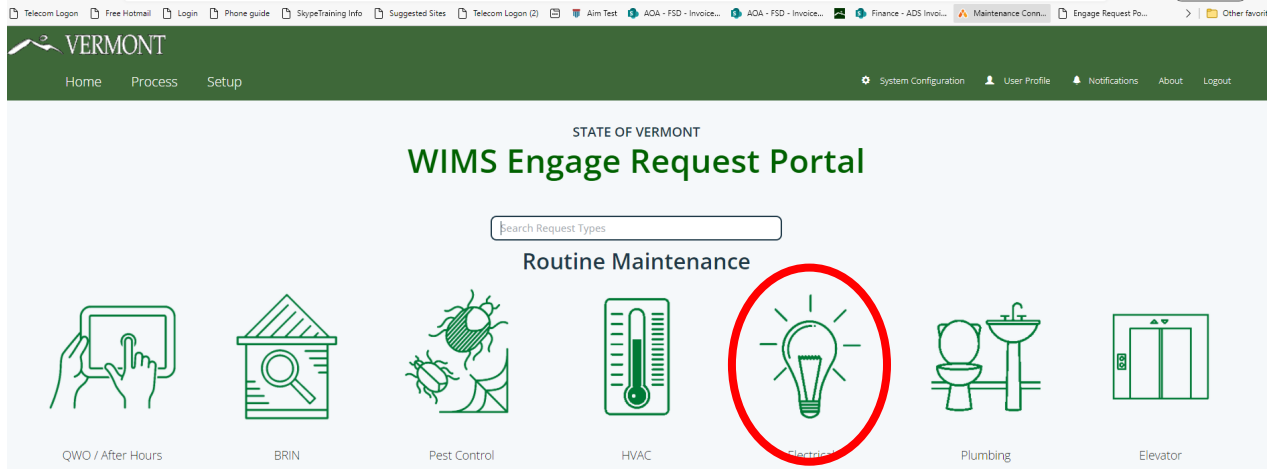
For your convenience, the search field located on the home page will assist you with selecting the most relevant tile.



How to submit a work order request in Engage

- Anything with an asterisk is a mandatory field
- If you are unsure of the question, use the question mark to the right of the question to assist you.
- If you need additional assistance, Select the **Customer Service (add the link)** Tile.

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.



The first page will default your personal information in for you. If your information is incorrect, please Select the **Customer Service (add the link)** Tile for assistance.

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

The screenshot shows the 'Plumbing Request' form. The form has a header with the Vermont logo and navigation links. The main title is 'Plumbing Request'. Below this is a section for 'Contact Information' with a question 'Is there an alternate contact for this request?' circled in red. Below this question are two radio buttons: 'Yes' and 'No'. Below the radio buttons are three input fields: 'Contact Name: *' with the value 'Demars Kari', 'Contact Phone: *' with the value '(802) 535-4549', and 'Contact Email: *' with the value 'Kari.Demars@vermont.gov'. At the bottom of the form are two buttons: 'Cancel' and '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.

VERMONT

Home Process Setup

Final Review

Please add any helpful related documents/images as needed below.
If changes to the request are required, select the previous button to go back and modify answers.

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!

UDF on Work order

Equipment plumbing issue:

Cancel < Previous Review

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

VERMONT

Home Process Setup

Final Review

Please add any helpful related documents/images as needed below.
If changes to the request are required, select the previous button to go back and modify answers.

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!

UDF on Work order

Equipment plumbing issue:

Cancel < Previous Review

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.

Request Details

Select the type of work order you are submitting. * Toilet

Select the toilet issue you are reporting. Clogged

Is this an abuse related issue?* No

Enter the work description for this work. * test

Is this affecting the entire building? Yes

Select / Verify Building: * 06344 - COURTHOUSE & OFFICE - CALEDONIA COUNTY (1126 MAIN ST, SAINT JOHNSBURY VT)

Enter additional location details here.

Final Review

Attach helpful pictures, documents or videos.

Drop files to attach, or Browse

UDF on Work order Equipment plumbing issue:

Cancel < Previous **Submit**

Process

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

1. Select Process Screen
2. Click your "Your Open Requests"
3. Find your open request in the column on the right.

STATE OF VERMONT
WIMS Engage Request Portal

Home Process Setup

Awaiting Your Review 30

Your Open Requests >100

Your Watch List

Your Closed Requests

All Requests

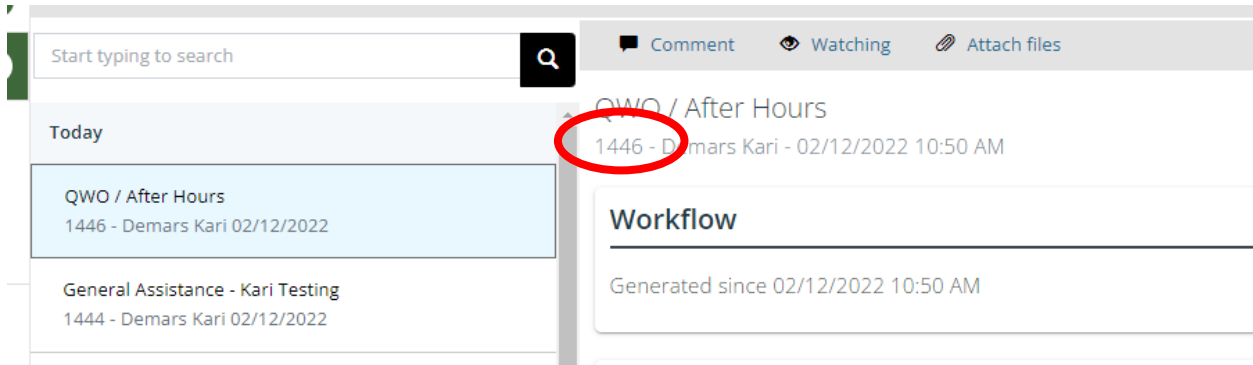
Start typing to search

Today

- General Assistance - Kari Testing
1441 - Demars Kari 02/12/2022
- General Assistance - Kari Testing
1440 - Demars Kari 02/12/2022
- Custodial
1439 - Demars Kari 02/12/2022

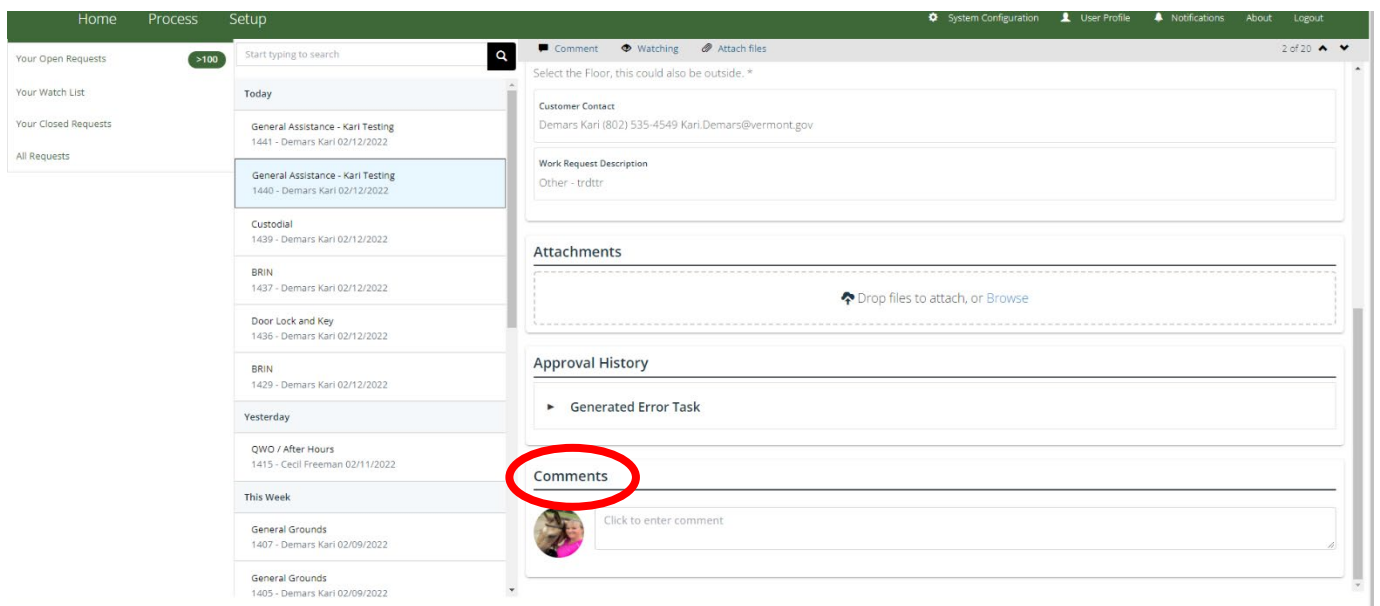
Engage Request Number

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.



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



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.

The screenshot displays a web application interface with a green header bar containing navigation links: Home, Process, Setup, System Configuration, User Profile, Notifications, About, and Logout. On the left side, there is a sidebar menu with four items: 'Your Open Requests' (with a '>100' badge), 'Your Watch List' (circled in red), 'Your Closed Requests', and 'All Requests'. The main content area is divided into three columns. The first column is a search bar with the text 'Start typing to search' and a magnifying glass icon. The second column is a list of requests, grouped by date: 'Today' (General Assistance - Kari Testing, 1441 - Demars Kari 02/12/2022; General Assistance - Kari Testing, 1440 - Demars Kari 02/12/2022; Custodial, 1439 - Demars Kari 02/12/2022; BRIN, 1437 - Demars Kari 02/12/2022; Door Lock and Key, 1436 - Demars Kari 02/12/2022; BRIN, 1429 - Demars Kari 02/12/2022), 'Yesterday' (QWO / After Hours, 1415 - Cecil Freeman 02/11/2022), and 'This Week' (General Grounds, 1407 - Demars Kari 02/09/2022; General Grounds, 1405 - Demars Kari 02/09/2022). The third column is a detailed view of a request, showing a 'Watching' button (circled in red) and an 'Attach files' button. Below these are sections for 'Customer Contact' (Demars Kari (802) 535-4549 Kari.Demars@vermont.gov), 'Work Request Description' (Other - trdtr), 'Attachments' (with a 'Drop files to attach, or Browse' button), 'Approval History' (with a 'Generated Error Task' entry), and 'Comments' (with a 'Click to enter comment' input field).