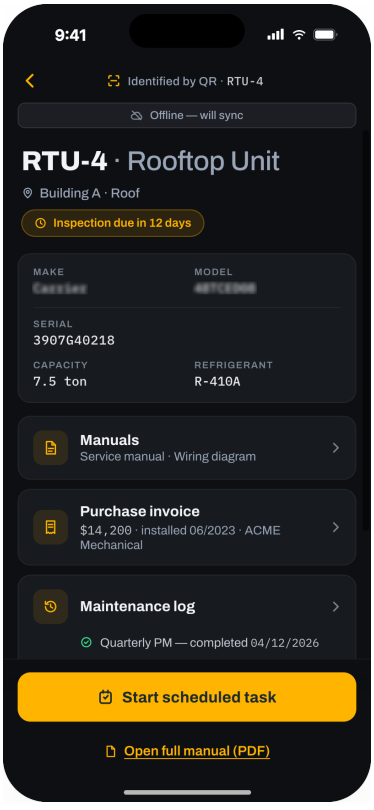
ZYLERGY

OPERATOR GUIDE

Zylergy Facilities

Operator Guide

For facility managers, technicians, dispatchers, compliance officers and contractors



SAMPLE DATA.

ZYLERGY

Zylergy, Inc.
Lewes, Delaware zylergy.com

ZY-FAC-OPG-01 Rev. A
Release 1.0 · October 2026

Zylergy Facilities Operator Guide
Document number ZY-FAC-OPG-01, Revision A
Release 1.0 · October 2026

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Revision history

REVISION	DATE	DESCRIPTION
A	October 2026	First issue for Release 1.0.

About this guide

Who this guide is for

This guide is for the people who do the daily maintenance work in Zylergy Facilities. They are facility managers on the walk-through and in the office, in-house technicians, contractors' technicians, dispatchers, compliance officers, and contractors who work through the marketplace. It covers work on iPad and iPhone and in the web console, describes each screen, and lists common problems and what to do about them. It assumes you know how to run a building and service its equipment. If you are new to Zylergy Facilities, start with the *Zylergy Facilities Quick Start Guide*. For setting up the account, users, integrations, the asset registry, schedules, obligations and contractors, see the *Zylergy Facilities Admin Guide*.

How this guide is organized

- Chapter 1, "Safety information," gives the safety messages for using Zylergy Facilities in a building.
- Chapter 2, "Getting to know Zylergy Facilities," describes the app and the web console, sign-in, navigation, notifications, offline work and personal settings.
- Chapter 3, "The walk-through," covers identifying assets by QR tag, by pointing the camera or by search, reading the asset brain, and hands-free identification.
- Chapter 4, "Working the queue," covers the work queue in the web console: what it shows, where its items come from, filters and statuses.
- Chapter 5, "Creating and routing work orders," covers task packages, credential checks, routing to in-house technicians, contractors and the marketplace, bids and award, and scheduling.
- Chapter 6, "Doing the work," covers guided checklists, readings, proof, the verification gate, adaptive and hands-free guidance, quality scoring and offline work.
- Chapter 7, "The compliance record and audit packs," covers compliance entries, audit packs, regulatory packs and scheduled attestations.
- Chapter 8, "Portfolio overview," covers compliance and work across all your sites, and analytics by site, asset class and contractor.

- Chapter 9, “For contractors,” covers contractor accounts, qualification and ratings, requests for proposal, bids, scoped access and doing the work.
- Chapter 10, “Screen reference,” describes each screen of the app and the web console.
- Chapter 11, “Troubleshooting,” lists common problems, their causes and what to do.
- The Glossary defines the terms used in this guide. The Index follows it.

Documentation set

DOCUMENT	NUMBER	FOR
Zylergy Facilities Quick Start Guide	ZY-FAC-QSG-01	New users: first sign-in and a first job
Zylergy Facilities Operator Guide (this guide)	ZY-FAC-OPG-01	Everyday work in the app and the web console, and a reference for every screen
Zylergy Facilities Admin Guide	ZY-FAC-ADG-01	Administrators: account, users and roles, the Company Brain, integrations, data and security

Conventions

CONVENTION	MEANING	EXAMPLE
Bold	A label on the screen: a button, tab, menu item, field or status, written exactly as the screen shows it	Tap **Start the checklist**.
Monospace	A value you type or read: serial numbers, readings, codes, document numbers	Enter 118.
A > B	A path through menus or settings	**Menu** > **Offline & pack**
Italic	The title of another document, or a term at the point where it is defined	*Zylergy Facilities Admin Guide*
Sample data.	Every screen in this guide shows sample data	Figure captions

Procedures are numbered steps. Do the steps in order. Each step is one action. Some procedures start with a **Before you begin** box that lists what must be ready first. Most end with a **Re-**

sult line that tells you what you see when the procedure worked. The line under a procedure title tells you who does the task and on which device.

This guide uses four kinds of notice:

> **⚠ WARNING**
>
> **Indicates a hazardous situation which, if not avoided, could result in death or serious injury.** A warning states the hazard, what can happen, and how to avoid it.

> **⚠ CAUTION**
>
> **Indicates a situation which, if not avoided, could result in minor or moderate injury, damage to equipment, or the loss or corruption of records.**

> NOTE
>
> Information that helps you complete the task or understand its result.

> TIP
>
> A faster or easier way to do something.

Send us your comments

To report an error or suggest an improvement to this guide, write to hello@zylergy.com. Include the document number (`ZY-FAC-OPG-01`), the revision (A) and the page number.

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1

CHAPTER 1

Safety information

IN THIS CHAPTER

- General safety messages 1
- Regulated and life-safety equipment 2
- Content in the app and in this guide 3

Read this chapter before you use Zylergy Facilities in a building. The safety messages in this chapter apply to the tasks in this guide. A message that applies to one step appears in the procedure, just before that step.

> NOTE
>
> Zylergy Facilities presents information from the equipment manufacturer's documentation and from your organization's records. It does not replace the manufacturer's instructions, applicable codes and regulations, your employer's safety procedures, or your training. Where they differ from what you see in the app, follow the manufacturer's instructions and your employer's procedures, and report the difference to your office.

1.1 General safety messages

⚠ WARNING

Hazardous voltage. Contact with energized parts can cause death or serious injury. Before you open any panel or service equipment, disconnect all power, including remote disconnects, follow your employer's lockout/tagout procedure, and verify with a meter that no voltage is present.

⚠ WARNING

Fall hazard. Work on roofs and at height can result in death or serious injury from a fall. Use the fall protection your employer requires. Do not use the app while climbing or moving near a roof edge; stop, secure your position, then use the device.

⚠ CAUTION

Refrigerant under pressure. Refrigerant can cause frostbite and injury, and venting it is prohibited. Only technicians certified under EPA Section 608 may handle refrigerant. Recover refrigerant as required by federal, state and local regulations.

⚠ CAUTION

Distraction near moving or energized equipment. Looking at a screen near rotating, energized or hot equipment can cause injury. Read the step, put the device in a secure place, then do the work.

⚠ CAUTION

Wrong equipment. Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

1.2 Regulated and life-safety equipment

Only qualified people may service or inspect elevators, fire pumps, fire dampers, fire alarm panels and similar systems. The messages below apply to any job on this equipment.

⚠ WARNING

Regulated work requires a qualified person. Elevator, fire protection and other regulated inspections and repairs must be performed by a person who holds the required credential. Zylergy Facilities records credentials and blocks unqualified assignments, but it does not authorize anyone to enter a hoistway, pit or machine room. Follow the access rules of the building and the requirements of the governing authority.

⚠ WARNING

Moving machinery and falls in the hoistway. Elevator equipment can start without warning, and the hoistway and pit present fall and crushing hazards that can cause death or serious injury. Only qualified elevator personnel may enter the machine room, hoistway or pit. Follow the elevator manufacturer's procedures and your employer's lockout/tagout procedure.

⚠ CAUTION

Fire protection impairment. Taking a fire pump, sprinkler system, damper or alarm out of service reduces the protection of the building and its occupants. Notify the building owner, the monitoring company and the authority having jurisdiction as your impairment procedure requires, and restore the system as soon as the work is complete.

1.3 Content in the app and in this guide

The guided checklist for a job is a short list of steps. Each step refers to the page of the manufacturer's manual it comes from. The checklist is not a full repair procedure. Before you do a step, read the manual page it cites, including any cautions on that page. If the app shows no caution for a step, check the manufacturer's documentation anyway. A caution can still apply.

When the app shows a reading as within its acceptance range, it has compared the reading with the range in the manufacturer's documentation. This is not a diagnosis of the equipment. Adaptive guidance, hands-free guidance and quality scores (Chapter 6) do not change this. The manufacturer's documentation and your training remain the authority for how the work is done.

Zylergy Facilities blocks an assignment when your organization has no record that the person holds a credential the obligation requires. It does not grant access to any part of a building.

> NOTE
>
> The procedure text in figures is sample content. Always use the current manufacturer's documentation for the equipment you service.

2

CHAPTER 2

Getting to know Zylergy Facilities

IN THIS CHAPTER

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- Search for an asset 10
- Notifications 10
- Work offline 11
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2.1 The app and the web console

You use the *Zylergy Facilities app* on iPad or iPhone at the asset, and the *web console* in a browser in the office. The audit pack is a PDF for people who do not use Zylergy Facilities, such as auditors and insurers.

Table 2-1 The app, the web console and the audit pack

PART	USED BY	MAIN WORK
The Zylergy Facilities app (iPad or iPhone)	Facility managers on the walk-through, in-house technicians and contractors' technicians	Scanning and confirming assets, reading the asset brain, following guided checklists, recording readings and proof, and completing jobs.
The web console (browser)	Facility managers in the office, dispatchers, compliance officers, portfolio administrators and administrators	Working the queue, creating and routing work orders, reviewing bids, reading the compliance record, exporting audit packs, regulatory packs and attestations, the portfolio overview, and account administration.
The audit pack (PDF)	Auditors, insurers, building owners and authorities having jurisdiction	Reviewing obligations against completed work, with proof.

The app uses the same layout, sign-in and settings as Zylergy Field and Zylergy Solar.

Roles and jobs

Each user holds one or more *roles*. Zylergy Facilities uses **Admin**, **Back office** and **Field tech**. Your administrator sets your roles, which control what you can do, and your access, which controls the assets you can see. Technicians and contractors see only the assets they are authorized for.

Table 2-2 shows the jobs in this guide and their roles.

Table 2-2 Jobs and roles in Zylergy Facilities

JOB	ROLE	WHAT THE JOB INVOLVES	WHERE
facility manager	Back office	Runs maintenance and compliance for a building or portfolio. Walks the building, works the queue, routes work and keeps the compliance record.	App and web console

in-house technician	Field tech	Works for your organization. Carries out guided jobs and captures proof.	App
contractor's technician	Field tech, in the contractor's account	Carries out work routed to the contractor, with the guided checklist and proof.	App
dispatcher	Back office	Schedules and routes work.	Web console
compliance officer	Back office	Produces regulatory packs and attestations across the portfolio.	Web console
portfolio administrator	Back office	Sets cross-site compliance, routing and marketplace policy.	Web console
contractor	Back office, for the contractor's office staff, in the contractor's account	An outside company that does work under a service agreement or wins it through the marketplace. It has access to the assets of the work routed to it.	See Chapter 9
administrator	Admin	Your organization's IT administrator. Manages users and their access, sign-in, integrations and security.	Web console

2.2 Sign in to the app

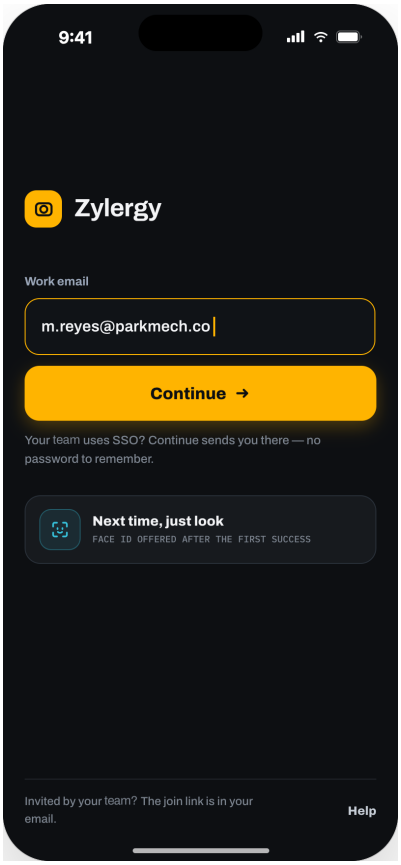
The sign-in screen asks only for your work email (Figure 2-1). What happens next depends on how your organization has set up sign-in.

ALL USERS · IPAD OR IPHONE · NEEDS A SIGNAL

BEFORE YOU BEGIN

- The Zylergy Facilities app is installed on your iPad or iPhone. Download it from the App Store. The device needs iPadOS or iOS 26 or later.
- Your organization has invited you, and you know the work email address the invitation was sent to.
- Your device has a network connection.

1. Open the Zylergy Facilities app.
2. In **Work email**, enter your work email address.
3. Tap **Continue**.
4. If your organization uses single sign-on, sign in on your company's sign-in page when it opens.
5. If the app asks for a 6-digit code, enter the code from your text message, email or authenticator app.
6. When the app offers Face ID for next time, choose whether to use it.



`Figure 2-1` The sign-in screen. Sample data.

RESULT

You are signed in. The first time, the app asks for camera access ("Allow the camera at first run" on page 8). After that, it opens on Home.

If you were invited, the join link is in your email. If the app does not recognize your address, check the address you entered. If it is correct, ask your administrator to invite you.

Allow the camera at first run

Zylergy Facilities asks for camera access once, at first run (Figure 2-2). It asks for notification and microphone access later, when a feature first needs it.

ALL USERS · IPAD OR IPHONE

1. Read the first-run screen.
2. Tap **Enable the camera**.
3. When iPadOS or iOS asks for permission, allow camera access.

RESULT

The Home screen opens.

If you tap **Not now — I'll type it in** instead, you find assets by searching for them (“Search for an asset” on page 10). You can allow camera access later in the Settings app on your device.

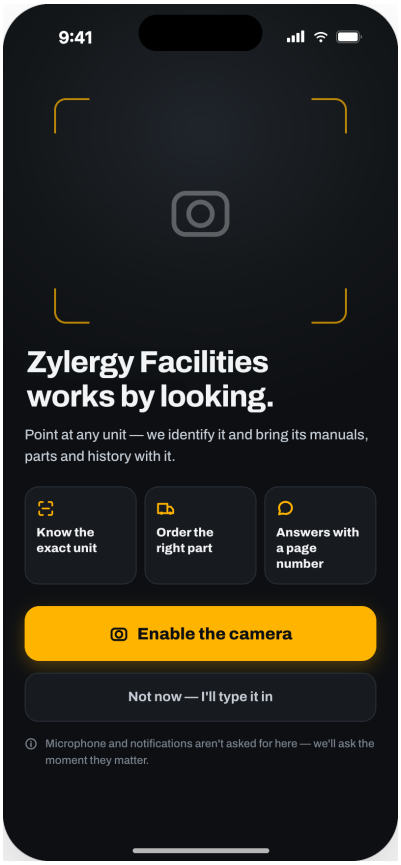


Figure 2-2 The first-run screen asks for camera access. Sample data.

2.3 Sign in to the web console

FACILITY MANAGER, DISPATCHER, COMPLIANCE OFFICER, PORTFOLIO ADMINISTRATOR, ADMINISTRATOR · WEB CONSOLE · NEEDS A SIGNAL

1. In a current version of Google Chrome, Microsoft Edge, Safari or Firefox, go to the web console address your administrator gave you.
2. Enter your work email address.
3. Click **Continue**.
4. If your organization uses single sign-on, sign in on your company's sign-in page.

5 If the console asks for a 6-digit code, enter the code from your text message, email or authenticator app.
6 If you belong to more than one organization, choose the one you want to work in.
7 If you chose an organization, click **Continue**.

RESULT

The web console opens.

The console remembers the organization you chose in this browser. If it signs you out after a period without activity, sign in again and it returns you to where you were.

2.4 Find your way around the app

Most work in the app starts with the asset in front of you. **Scan** is in the bottom bar. Items that are not about one asset are in **Menu**.

Table 2-3 The bottom bar and the main screens of the app

PART	WHAT IT IS FOR
Home	Lists the work orders assigned to you, work you paused under **Pick up where you left off**, and what changed since you last looked. Tap an item to open it.
Scan	Opens the camera to scan a QR tag or identify an asset by pointing at it (Chapter 3).
Your work orders	The work orders routed to you, with their asset, location and due date.
Menu	Manuals, **Notifications**, your account and settings, and **Help**.
The asset brain	Opens after you scan and confirm an asset. Tasks on an asset start here (“Read the asset brain” on page 17).

> NOTE
> Home and the work-order list work as they do in the other Zylergy apps.

2.5 Search for an asset

Use search when there is no QR tag, the camera cannot see the asset, or you are not at the asset.

FACILITY MANAGER, TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE FOR STORED ASSETS

1. Open search from the scan screen or from **Menu**.
2. Enter an asset ID, a location or an asset class, for example `RTU-4`, a floor or `elevator`.
3. Tap the asset in the results. The app shows the asset's ID, class and location.

> **⚠ CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

4. If you are at the asset, check it against its tag or nameplate.
5. Confirm the asset.

RESULT

The asset brain opens.

2.6 Notifications

Notifications tell you when something needs you and what has changed. They are grouped under **Needs you** and **FYI**. Items under **Needs you** stay until you act on them. You can swipe FYI items away.

Table 2-4 Notification groups

GROUP	WHAT IT HOLDS	HOW IT CLEARS
Needs you	Items that wait for you to act, such as work routed to you	When you do the work
FYI	Items that tell you what changed	Swipe it away, or tap **Clear**

To see your notifications, tap **Menu** > **Notifications**. The badge counts only the items that need you. You set push notifications, a daily digest and quiet hours in your personal settings ("Personal settings" on page 11).

2.7 Work offline

Mechanical rooms, roofs and elevator machine rooms often have no coverage. You can scan a QR tag, open the asset brain and record a guided checklist without a signal. When you are offline, the app shows **Offline — will sync** at the top of the screen. This is not an error.

Table 2-5 Offline behavior

WORKS OFFLINE	NEEDS A SIGNAL
Scanning an asset's QR tag	Signing in
Opening the asset brain and its manuals	The web console
Following a guided checklist	Writing the compliance entry (sent when you are back online)
Recording readings and capturing photos	Updating the work queue (sent when you are back online)
Completing a job once its proof is captured	Writing back to your CMMS (sent when you are back online)

Work you record offline is saved on the device. It synchronizes automatically when the connection returns.

2.8 Personal settings

Settings that affect only you are in **Menu**, under your account. Your administrator manages your roles, the assets you can see and your organization's settings.

Table 2-6 Personal settings in the app

SETTING	WHAT IT DOES
Glove	Makes controls larger and easier to hit with gloves on.
Text LG	Uses a larger text size.
Contrast	Increases contrast for glare and low light.
Dark, **Daylight**, **Baseline**, **Auto**	Color schemes. **Auto** follows the ambient light, for example dark in a mechanical room and daylight in bright sun on the roof. Tap a scheme to keep it.
Read QR / barcode first	Looks for a QR tag or barcode before trying to identify the asset from what the camera sees.

Notifications	Push notifications when something needs you, an optional daily digest at a time you choose, and quiet hours when the app does not notify you.
Units and formats	The units and date format the app uses, such as °F, PSI and MM/DD/YYYY.
Sign out	Signs you out of the app on this device.

The web console has its own personal settings: appearance, table density, your start page, and email notifications.

2.9 The web console

Each page of the web console has a header at the top (Figure 2-3).

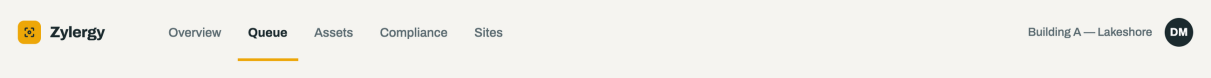


Figure 2-3 The web console header with the Queue tab selected and the building selector on the right. Sample data.

Table 2-7 The web console header

ELEMENT	WHAT IT DOES
Overview	Opens the portfolio overview: compliance and work across your sites (Chapter 8).
Queue	Opens the work queue for the selected building (Chapter 4).
Assets	Opens the assets of the selected building and, from there, the asset brain for each asset in the web console.
Compliance	Opens the compliance record for the selected building (Chapter 7).
Sites	Opens the sites in your portfolio and the buildings in each.
Building selector	Shows the building you are working in, for example **Building A — Lakeshore**. Click it to choose another building.
Your initials	Your account.

The tab you are on is underlined. The work queue and the compliance record show the building selected in the building selector. **Overview** covers all the sites you can see.

2.10 What the status labels mean

The work queue, the compliance record, the portfolio overview and the asset brain use one set of statuses. Each status has a color, an icon and a label.

Table 2-8 Status labels

STATUS AS SHOWN	MEANING	LOOK
Compliant, **Up to date**, **Verified**	The obligation is met, or the work is done and its proof accepted.	Green, check mark
Due in *n* days, for example **Due in 5 days**, or **Attention**	Due soon.	Amber, clock
Overdue *n* days, for example **Overdue 7 days**, **Out of compliance** or **Critical**	Past due. An overdue compliance obligation puts the asset out of compliance.	Red, warning triangle
Routed — followed by the technician or contractor, for example **Routed — ACME Fire**, or **Scheduled**	A work order exists and is assigned or scheduled.	Blue or gray
Upcoming	Due later. No action is needed yet.	Gray
Offline — will sync	The app has no connection. Your work is held on the device.	Gray

An obligation moves from due, through routed or scheduled, to verified and compliant. If it passes its due date first, it becomes overdue.

3 CHAPTER 3

The walk-through

IN THIS CHAPTER

- Ways to identify an asset 14
- Scan an asset's QR tag 15
- Identify an asset by pointing the camera 16
- Read the asset brain 17
- When an asset has no tag or no record 18
- Hands-free identification 18

On the walk-through, a facility manager goes around the building with the app and scans each asset. At each asset, the app shows the asset's details and what is due. Technicians use these steps to identify the asset before they start a job (Chapter 6).

> ⚠ **WARNING**
>
> **Fall hazard.** Work on roofs and at height can result in death or serious injury from a fall. Use the fall protection your employer requires. Do not use the app while climbing or moving near a roof edge; stop, secure your position, then use the device.

3.1 Ways to identify an asset

Table 3-1 Ways to identify an asset

METHOD	WHEN TO USE IT
Scan the *QR tag*	The asset has a tag. This is the most reliable method, because each tag is registered to one asset record.
Point-and-identify	The asset has no tag, or the tag cannot be reached. Point the camera at the asset itself.

Search	There is no tag and the camera cannot identify the asset, or you are not at the asset.
Hands-free	You are wearing supported smart glasses or need your hands free (“Hands-free identification” on page 18).

Scanning works offline. Search works offline for the assets stored on the device.

With any method, the app shows you the asset it found. You check it against the tag and the nameplate and confirm it before the asset brain opens.

3.2 Scan an asset’s QR tag

FACILITY MANAGER, TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

1. Tap **Scan**.
2. Point the camera at the asset’s QR tag. The app shows the asset the tag is registered to: its asset ID, class and location.

> **⚠ CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

3. Compare the asset ID on the screen with the ID on the tag, and the make, model and serial number with the asset’s nameplate.
4. If anything does not match, do not continue: scan again, or search for the asset (“Search for an asset” on page 10).
5. If everything matches, confirm the asset.

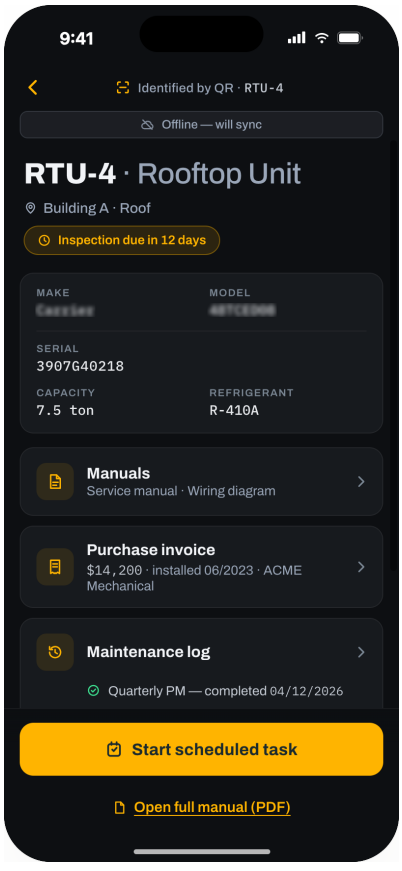


Figure 3-1 The asset brain for a rooftop unit identified by its QR tag. Sample data.

RESULT

The asset brain opens, marked **Identified by QR** with the asset ID (Figure 3-1).

If the tag and the nameplate disagree, the tag may be on the wrong asset or the asset record may be wrong. Do not work on the asset. Tell your facility manager so that the tag or the record can be corrected.

3.3 Identify an asset by pointing the camera

Point-and-identify recognizes an asset from what the camera sees. Assets of the same model often look alike, so the app asks you to choose when it is not certain.

FACILITY MANAGER, TECHNICIAN · IPAD OR IPHONE

1. Tap **Scan**.
2. Point the camera at the asset so that it fills most of the screen.
3. If the app shows more than one possible asset, tap the one in front of you.
4. If the app finds no asset, search for it instead (“Search for an asset” on page 10).

> **⚠ CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

5. Compare the asset ID, location, make, model and serial number on the screen with the asset and its nameplate.
6. If everything matches, confirm the asset.

RESULT

The asset brain opens.

> TIP
>
> If several identical assets stand side by side, scan the QR tag instead. The camera may not tell them apart.

3.4 Read the asset brain

The *asset brain* shows one asset's record from your organization's asset registry, with the manuals and records your organization holds for it (Figure 3-1). In the web console, you open the asset brain from the **Assets** tab or from the work queue.

Table 3-2 What is on the asset brain

AREA	WHAT IT SHOWS
Header	How the asset was identified, for example **Identified by QR** with the asset ID. **Offline — will sync** appears when you have no signal.
Title and location	The asset ID and class, and where it is, for example a building and its roof or core.
Status	The asset's compliance status and the next item due.
Identity	**Make**, **Model** and **Serial**, and specifications for the asset class, such as **Capacity** and **Refrigerant** for a rooftop unit.
Manuals	The manuals and drawings for the asset that you are authorized to read, such as the service manual and the wiring diagram.
Purchase invoice	The purchase invoice, with the price, the installation date and the installer.
Maintenance log	Completed maintenance and inspections, newest first.
Start scheduled task	Starts the guided checklist for the work order assigned to you on this asset ("Start a job at the asset" on page 34).
Open full manual (PDF)	Opens the asset's manual in full.

See what is due on an asset

The asset brain shows the asset's compliance status and its obligations. Obligations include preventive maintenance under the manufacturer's interval, compliance obligations such as an elevator inspection or a refrigerant log, and warranty events. Each obligation has a due date and a *governing authority*. The governing authority is the manufacturer's interval or a code or standard, such as ASME A17.1, NFPA 25, NFPA 80, or EPA 608 for refrigerant records.

The maintenance scope and intervals come from the manufacturer's documentation for the asset. Each interval can be traced back to the page of the manual it was taken from.

Open a manual

FACILITY MANAGER, TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE FOR STORED MANUALS

1. On the asset brain, tap **Manuals**.
2. Tap the document you want, for example the service manual or the wiring diagram.
3. To open the asset's manual in full instead, tap **Open full manual (PDF)**.

RESULT

The document opens on the device.

You see only the manuals that your organization holds for the asset and that you are authorized to read. Zylergy Facilities records each time a manual is opened. Manuals are your organization's own, unless the manufacturer has licensed them for wider use.

The purchase invoice and the maintenance log

Tap **Purchase invoice** to see what the asset cost, when it was installed and by whom, for example to answer a warranty question on the walk-through.

Tap **Maintenance log** to see the asset's completed work, newest first. Each completed job in the log has a compliance entry behind it, with who did the work, when, what was done and the proof (Chapter 7).

3.5 When an asset has no tag or no record

If you find an asset without a QR tag, or one that has no record in Zylergy Facilities, note its location and nameplate details. If you are not the facility manager, pass them to your facility manager. To add assets, register QR tags and capture nameplates, see the *Zylergy Facilities Admin Guide* (ZY-FAC-ADG-01), chapter "The Company Brain: asset registry and documents."

3.6 Hands-free identification

With supported smart glasses or by voice, you can identify an asset and open its asset brain without holding a device. This helps in a tight mechanical space or when you wear gloves.

FACILITY MANAGER, TECHNICIAN · SMART GLASSES OR VOICE

BEFORE YOU BEGIN

- You have a supported hands-free device, set up for your account.

1. Look at the asset's QR tag, or at the asset itself.
2. When the asset is shown, check its ID and nameplate details against the asset.
3. Confirm the asset by voice or with the control your device provides.

RESULT

The asset brain opens on your hands-free device. If hands-free cannot identify the asset or is not available, use the app on your iPad or iPhone.

For hands-free guidance during a job, see "Hands-free guidance" on page 38.

4

CHAPTER 4

Working the queue

IN THIS CHAPTER

- What the work queue shows 21
- Where queue items come from 22
- Filter the queue 22
- Read the side panel 23
- Decide what to work first 24

The *work queue* lists the work that is due in the selected building (Figure 4-1). Facility managers and dispatchers work from it in the web console.

4.1 What the work queue shows

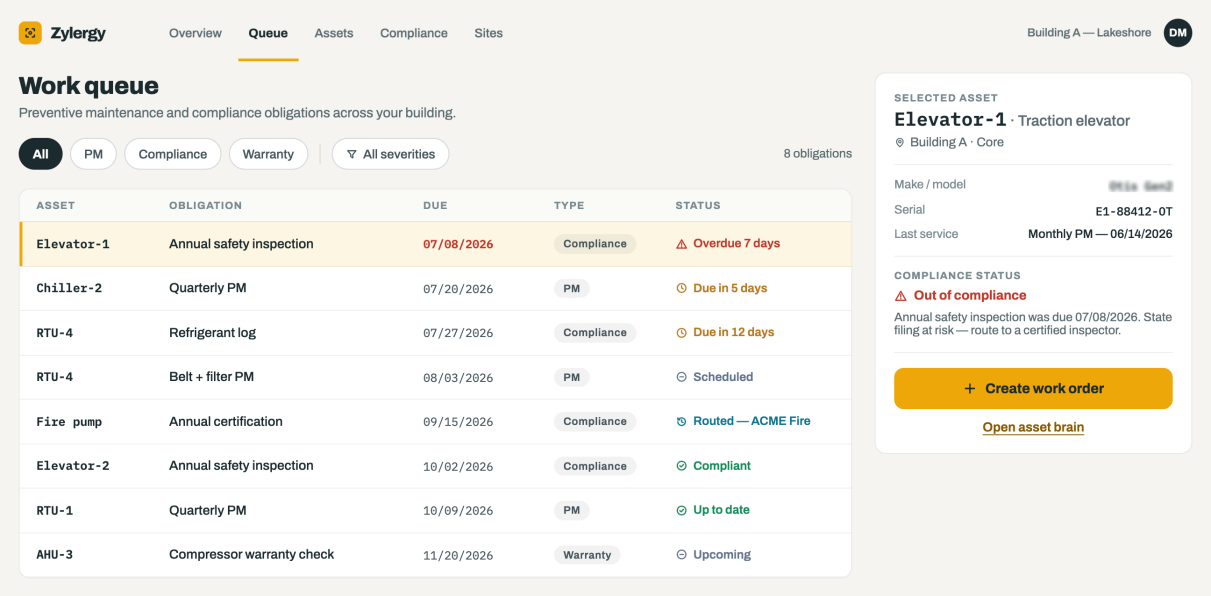


Figure 4-1 The work queue below the console header, with an overdue elevator inspection selected. Sample data.

Table 4-1 Columns of the work queue

COLUMN	WHAT IT SHOWS
Asset	The asset ID, for example `Elevator-1` or `RTU-4`.
Obligation	What is due, for example **Annual safety inspection**, **Quarterly PM**, **Refrigerant log** or **Compressor warranty check**.
Due	The due date. Past due dates are highlighted.
Type	**PM** (preventive maintenance), **Compliance** or **Warranty**.
Status	Where the obligation stands, for example **Overdue 7 days**, **Due in 5 days**, **Scheduled**, **Routed — ACME Fire**, **Compliant**, **Up to date** or **Upcoming** (Table 2-8).

Above the list, the page shows **Work queue**, a filter bar and the number of obligations shown. To the right, a side panel shows the selected row (“Read the side panel” on page 23).

4.2 Where queue items come from

Work enters the queue from the sources in Table 4-2. Items from each source use the columns and statuses described above.

Table 4-2 Sources of work in the queue

SOURCE	TYPE	EXAMPLE
Preventive maintenance intervals from the manufacturer's documentation, as set up for your assets	**PM**	A quarterly PM on a chiller
Compliance obligations, each with its governing authority	**Compliance**	An annual elevator safety inspection under ASME A17.1, a refrigerant log under EPA 608, a fire pump certification under NFPA 25, or a fire damper inspection under NFPA 80
Warranty events	**Warranty**	A compressor warranty check before the warranty ends
Work orders read from your CMMS, if your organization uses Zylergy Facilities with an existing CMMS	As in the CMMS	A work order raised in the CMMS

Work can also come from a *condition-based trigger*. A trigger is raised when an existing building system, such as a building management system, reports a condition on an asset that needs attention. The item enters the queue and is routed, carried out and verified like other work. In buildings without such systems, interval and compliance work continues as before. For the building systems that can be connected, see the *Zylergy Facilities Admin Guide* (ZY-FAC-ADG-01), chapter "Integrations."

4.3 Filter the queue

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

1. In the header, check that the building selector shows the building you want.
2. Click **Queue**.
3. Click a type: **All**, **PM**, **Compliance** or **Warranty**.
4. To narrow the list by severity, open **All severities**.
5. Choose a severity.

RESULT

The queue shows only the matching obligations, and the count above the list changes to match.

4.4 Read the side panel

When you select a row, the side panel shows the asset and its compliance status (Figure 4-2).

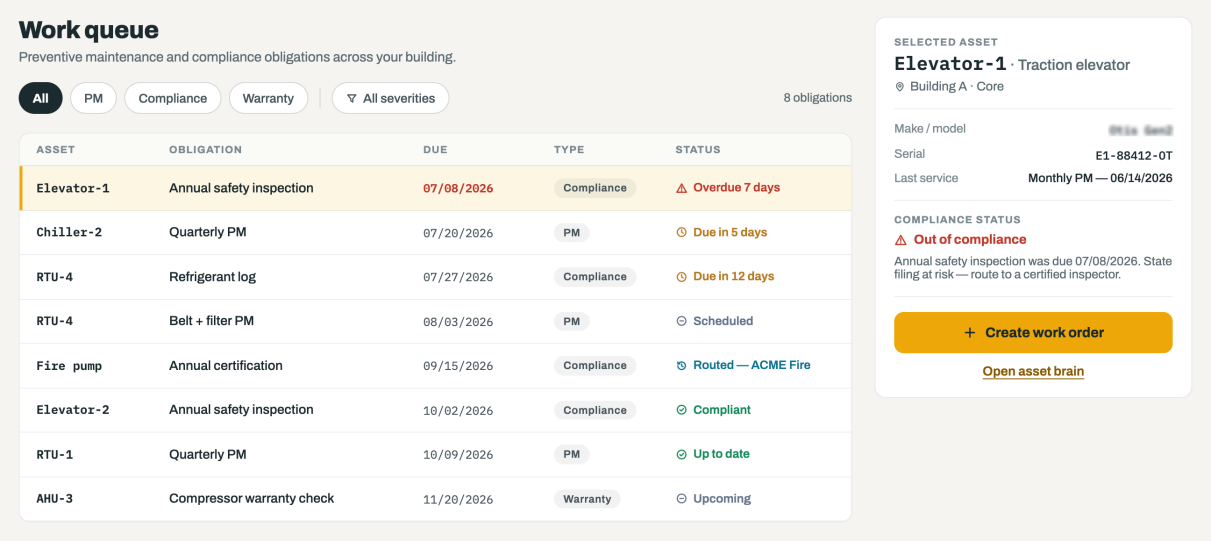


Figure 4-2 The work queue with the side panel for the selected asset. Sample data.

Table 4-3 The side panel

AREA	WHAT IT SHOWS
Selected asset	The asset ID and class, and its location.
Asset details	**Make / model**, **Serial**, and **Last service**.
Compliance status	The asset's status, for example **Out of compliance**, with a short explanation of what is due and what is at risk.
Create work order	Creates a work order for the selected obligation ("Create a work order" on page 26).
Open asset brain	Opens the asset brain for the asset in the web console.

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

1. In the work queue, click the row you want.
2. Read **Compliance status** in the side panel.
3. To see the asset's details, click **Open asset brain**.

4 To act on the obligation, click **Create work order**.

RESULT

The side panel shows the selected obligation and its options.

4.5 Decide what to work first

An overdue compliance obligation puts the asset **Out of compliance**. The queue marks it in red with a warning icon. Work these items first. An item that shows **Routed** or **Scheduled** already has a work order. Do not create another one.

> TIP
> Click **Compliance** in the filter bar to see only the obligations that affect your compliance record, then work from the top.

A completed obligation returns to the queue when it next falls due.

5

CHAPTER 5

Creating and routing work orders

IN THIS CHAPTER

- Where work can go 26
- Create a work order 26
- Review the task package 28
- How credential checks work 28
- Route to an in-house technician 29
- Route to a known contractor 29
- Send a work order to one contractor as a request for proposal 30
- Offer a work order on the marketplace 30
- Compare bids and award the work 31
- Record the routing rationale 31
- Schedule the visit 31
- Save a draft 32
- After the work order is routed 32
- Hand off a parts need 32

A *work order* assigns an obligation to a person or a company. When you create a work order, Zylergy Facilities builds its *task package* from the asset brain. You then route the work order, record the reason, and schedule the visit.

5.1 Where work can go

Routing assigns a work order to the technician or contractor who will do the work. Table 5-1 lists the destinations. The marketplace is optional.

Table 5-1 Routing destinations

DESTINATION	USE IT WHEN	WHAT HAPPENS
In-house technician	Your own staff can do the work and hold any credential it requires.	The work order appears in the technician's app.
Known contractor	The work needs a credential your staff do not hold, or a contractor you work with should do it, usually under a service agreement.	The work order goes to the contractor, who gets access to this asset only. You can also send it as a request for proposal ("Send a work order to one contractor as a request for proposal" on page 30).
Marketplace	You want bids from qualified contractors.	The work order is offered as a request for proposal to qualified contractors. They bid, and you award the work ("Offer a work order on the marketplace" on page 30).

The choice of destination, and the reason for it, are written to the asset's compliance record.

5.2 Create a work order

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

1. In the work queue, select the obligation.
2. In the side panel, click **Create work order**. The **New work order** page opens (Figure 5-1).
3. At the top, check the asset, its location and status, and the obligation with its due date.

RESULT

The work order is created with its task package, ready to route.

You can also start from the portfolio overview. Click **Route work** under **Needs attention** ("Act on what needs attention" on page 49).

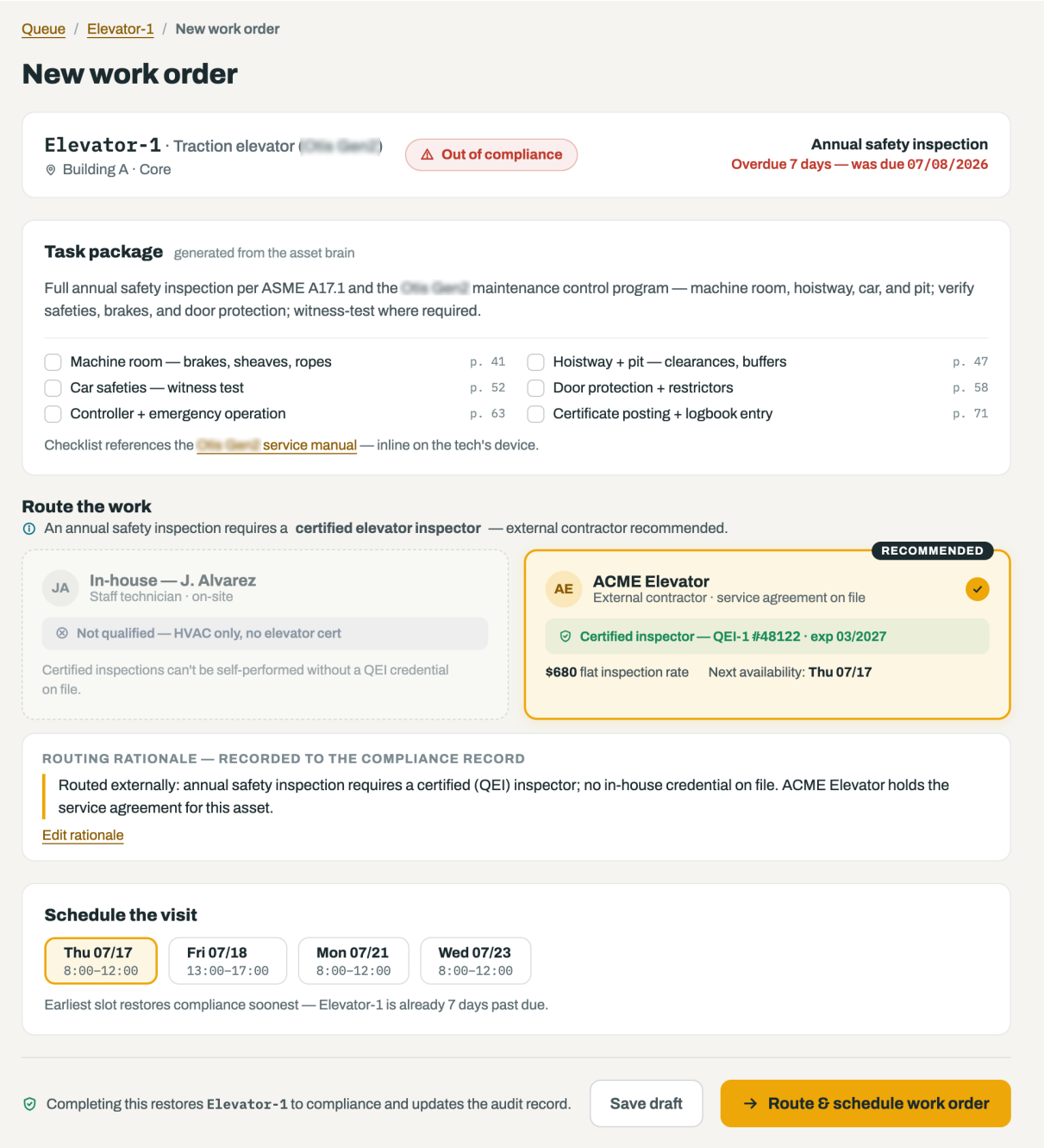


Figure 5-1 The New work order page for an overdue elevator inspection, with the task package, routing options, routing rationale and visit slots. Sample data.

5.3 Review the task package

The *task package* holds the scope of the work and a short checklist for the obligation. Zylergy Facilities generates it from the asset brain. Each checklist item names the page of the manufacturer's manual it comes from. The checklist appears on the device of the person who does the work, with a link to each manual page.

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

1. Under **Task package**, read the scope.
2. Read each checklist item and the manual page it cites.
3. If the scope or a page does not match what the obligation requires, check the asset's manuals and obligations before you route the work order (see the *Zylergy Facilities Admin Guide* (ZY-FAC-ADG-01), chapter "Schedules and obligations").

RESULT

You know what the work involves and which manual pages it uses.

The scope and checklist depend on the manuals your organization holds for the asset. See the *Zylergy Facilities Admin Guide* (ZY-FAC-ADG-01), chapter "The Company Brain: asset registry and documents."

5.4 How credential checks work

Some obligations can be carried out only by a person who holds a specific *credential*. For example, an annual elevator safety inspection under ASME A17.1 requires a certified elevator inspector with a Qualified Elevator Inspector (QEI) credential. Refrigerant work requires EPA 608 certification.

When you route a work order, Zylergy Facilities compares the credential the obligation requires with the credentials on file for each technician and contractor:

- An in-house technician without the required credential is blocked. Their card is shown dimmed, with the reason, for example **Not qualified — HVAC only, no elevator cert**.
- A contractor who holds the credential and has a service agreement on file is recommended, with the credential and its expiration date shown, for example **Certified inspector — QEI-1 #48122 · exp 03/2027**.
- A line under **Route the work** explains the recommendation.

Credentials are kept on file for your staff and for each contractor. See the *Zylergy Facilities Admin Guide* (ZY-FAC-ADG-01), chapter "Schedules and obligations."

5.5 Route to an in-house technician

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

BEFORE YOU BEGIN

- The work order is open on the **New work order** page.
- The obligation needs no credential, or the technician holds it.

1. Under **Route the work**, select the in-house technician's card.
2. Under **Routing rationale — recorded to the compliance record**, read the reason.
3. To change the reason, click **Edit rationale**.
4. Enter the new reason ("Record the routing rationale" on page 31).
5. Under **Schedule the visit**, select a slot ("Schedule the visit" on page 31).
6. Click **Route & schedule work order**.

RESULT

The work order appears in the technician's app, and the obligation shows its new status in the work queue.

5.6 Route to a known contractor

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

1. Under **Route the work**, select the contractor's card. The card shows the contractor, whether a service agreement is on file, the credential, the contractor's rate and the next availability.
2. Under **Routing rationale — recorded to the compliance record**, read the reason.
3. To change the reason, click **Edit rationale**.
4. Under **Schedule the visit**, select a slot.
5. Click **Route & schedule work order**.

RESULT

The work order is routed to the contractor. The contractor gets access to this asset at routing. In the work queue, the status shows **Routed** — followed by the contractor's name.

The contractor's technician does the work in the Zylergy Facilities app, with the guided checklist and proof your own staff use (Chapter 6).

5.7 Send a work order to one contractor as a request for proposal

With an *RFP handoff*, you send a work order as a request for proposal to one contractor you know. When the contractor accepts, it gets access to the asset and does the work.

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

1. Open the work order.
2. Review its task package.
3. Choose a request for proposal to a known contractor as the destination.
4. Choose the contractor.
5. Check the routing rationale.
6. Send the request.

RESULT

The request goes to the contractor. When the contractor accepts, the work order is routed to the contractor, who gets access to this asset.

5.8 Offer a work order on the marketplace

On the *marketplace*, you offer a work order as a request for proposal to qualified contractors, compare their bids and award the work. Your portfolio administrator sets which work may go to the marketplace and which contractors qualify.

FACILITY MANAGER · WEB CONSOLE

1. Open the work order.
2. Review its task package.
3. Choose the marketplace as the destination.
4. Check the routing rationale.
5. Publish the request for proposal.

RESULT

The request is offered to qualified contractors. Each can review the asset brain and the scope, and submit a bid.

5.9 Compare bids and award the work

A *bid* is a contractor's offer to carry out a work order published to the marketplace.

FACILITY MANAGER · WEB CONSOLE

1. Open the work order that you published to the marketplace.
2. Review the bids, together with each contractor's qualification and rating.
3. Award the work order to one contractor.

RESULT

The awarded contractor gets access to the asset and does the work with the guided checklist and through the verification gate. The award and its rationale are written to the compliance record.

A contractor's rating comes from its completed marketplace work ("Ratings" on page 53).

5.10 Record the routing rationale

The *routing rationale* is the recorded reason for a routing decision. For example: routed externally because the inspection requires a certified inspector and no in-house credential is on file. Zylergy Facilities proposes the rationale from the routing choice and the credential check. The rationale is written to the asset's compliance record and appears in the audit pack, so an auditor can see why each job went where it did.

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

1. On the work order, under **Routing rationale — recorded to the compliance record**, read the proposed reason.
2. To change it, click **Edit rationale**.
3. Enter the reason in plain words.

RESULT

The rationale is saved with the work order and written to the compliance record when you route it.

5.11 Schedule the visit

Under **Schedule the visit**, the work order shows the open slots for the technician or contractor you selected, each with a date and time window. If the obligation is overdue, a hint under the slots can show which slot restores compliance soonest.

FACILITY MANAGER, DISPATCHER · WEB CONSOLE

1. Under **Schedule the visit**, select a slot.
2. Check the line at the bottom of the page, which says what completing the work order will do, for example restore the asset to compliance.
3. Click **Route & schedule work order**.

RESULT

The work order is routed and the visit is scheduled.

5.12 Save a draft

If you are not ready to route, click **Save draft** at the bottom of the **New work order** page. The work order is saved with its task package and rationale, and you can return to it later.

5.13 After the work order is routed

- The technician or contractor who does the work sees the work order and its asset.
- The obligation's status changes in the work queue, for example to **Scheduled** or **Routed** — followed by the contractor.
- When the work is done and its proof captured, the job is verified, the compliance entry is written, and the obligation shows **Compliant**.
- If your organization uses Zylergy Facilities with an existing CMMS, the completion and the compliance entry are also written back to the CMMS.

5.14 Hand off a parts need

When a job has a bill of materials, Zylergy Facilities hands it off to your organization's purchasing process. If your organization has set up an account with a distributor, the bill of materials can go to that account instead. Zylergy Facilities does not buy or resell parts and is not a party to the purchase.

6

CHAPTER 6

Doing the work

IN THIS CHAPTER

- Before you start a job 33
- Find the work assigned to you 34
- Start a job at the asset 34
- Follow the guided checklist 35
- Record readings 36
- When a reading is out of range or a step cannot be done 37
- Capture proof 37
- Clear the verification gate and complete the job 38
- Adaptive guidance 38
- Hands-free guidance 38
- Quality scores for completed jobs 39
- Work offline at the asset 40

In-house technicians and contractors' technicians do the work at the asset. Each job has a guided checklist with the manual page for each step and the proof the job needs. The verification gate keeps the job from being completed until the proof is captured.

6.1 Before you start a job

Read the task package and the manual pages for the job before you go to the asset. Check that you hold any credential the job requires. Zylergy Facilities blocks the assignment of certified work to a person without the credential on file. Safe work remains your responsibility and your employer's.

> **⚠ WARNING**
>
> **Regulated work requires a qualified person.** Elevator, fire protection and other regulated inspections and repairs must be performed by a person who holds the required credential. Zylergy Facilities records credentials and blocks unqualified assignments, but it does not authorize anyone to enter a hoistway, pit or machine room. Follow the access rules of the building and the requirements of the governing authority.

For elevator work, read the message on moving machinery and the hoistway in “Regulated and life-safety equipment” on page 2. For fire protection work, read the message on impairment there.

6.2 Find the work assigned to you

IN-HOUSE TECHNICIAN, CONTRACTOR’S TECHNICIAN · IPAD OR IPHONE

1. Open the Zylergy Facilities app.
2. On Home, look at the work orders assigned to you.
3. Tap a work order to see its asset, its location, its due date and its task package.

RESULT

You know where to go and what the job involves.

If notifications are turned on, the app also notifies you when a work order is routed to you (“Notifications” on page 10). You see only the work orders and assets you are authorized for.

6.3 Start a job at the asset

IN-HOUSE TECHNICIAN, CONTRACTOR’S TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

BEFORE YOU BEGIN

- The work order is assigned to you.
- You are at the asset.

1. Tap **Scan**.
2. Scan the asset’s QR tag.

> **⚠ CAUTION**
>
> **Wrong equipment.** Working on equipment other than the one shown in the app can cause injury or damage. Before you start, check that the make, model and serial number on the screen match the nameplate.

3. Compare the asset ID on the screen with the tag, and the make, model and serial number with the nameplate.
4. If anything does not match, do not continue. Search for the asset, and tell your facility manager.
5. If everything matches, confirm the asset. The asset brain opens.
6. Tap **Start scheduled task**.

RESULT

The guided checklist opens with the asset and the job at the top, for example **RTU-4 · Quarterly PM** (Figure 6-1).

6.4 Follow the guided checklist

The *guided checklist* lists the steps of the job under **Checklist**, with a bar that shows how many are done, for example **3 of 4 done** (Figure 6-1). Each step has a link to the manual page it comes from, for example **manual p. 24**.

IN-HOUSE TECHNICIAN, CONTRACTOR'S TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

> **⚠ WARNING**
>
> **Hazardous voltage.** Contact with energized parts can cause death or serious injury. Before you open any panel or service equipment, disconnect all power, including remote disconnects, follow your employer's lockout/tagout procedure, and verify with a meter that no voltage is present.

1. Tap the manual page link for the first open step. The manual opens at that page.
2. Read the page, including any cautions.
3. Return to the checklist.
4. Do the work the step describes.
5. Mark the step done. The step is checked off and the progress bar moves on.
6. Repeat for each remaining step.

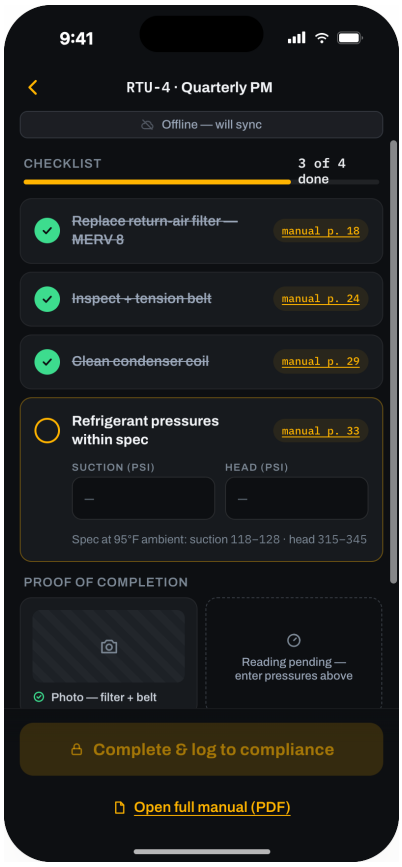


Figure 6-1 The guided checklist with three steps done, the readings still to enter, and the completion control unavailable. Sample data.

RESULT

Each step you complete is saved on the device, and the next open step is ready.

To read more than the cited page, tap **Open full manual (PDF)** at the bottom of the checklist. If you stop partway through, the job stays where you left it. Home lists it under **Pick up where you left off**.

6.5 Record readings

Some steps ask for measured values, such as refrigerant pressures. As you enter each reading, the app checks it against its *acceptance range* from the manufacturer's documentation. The range is shown under the fields, for example **Spec at 95°F ambient: suction 118–128 · head 315–345**.

IN-HOUSE TECHNICIAN, CONTRACTOR'S TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

> **⚠ CAUTION**
>
> **Refrigerant under pressure.** Refrigerant can cause frostbite and injury, and venting it is prohibited. Only technicians certified under EPA Section 608 may handle refrigerant. Recover refrigerant as required by federal, state and local regulations.

1. Take the measurements the step asks for, under the conditions the range states.
2. Enter each value in its field, for example **Suction (PSI)** and **Head (PSI)**. The app checks each value against the acceptance range.
3. Check the reading tile under **Proof of completion**. It shows your readings after you enter them. Until then, it shows the reading as pending.

RESULT

The readings are saved on the device as part of the job's proof.

6.6 When a reading is out of range or a step cannot be done

If a reading is outside its acceptance range, or a step cannot be done, follow these rules:

- Record the value you measured. Do not adjust it to fit the range.
- Do not complete the job as if every reading were in range. Tell your facility manager what you found.
- If a step cannot be done, for example because the asset is not accessible or a part is missing, stop and tell your facility manager.

6.7 Capture proof

Proof is the set of photos and readings a job requires. Under **Proof of completion**, each tile shows one item of proof and whether it has been captured, for example **Photo — filter + belt**.

IN-HOUSE TECHNICIAN, CONTRACTOR'S TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

1. Under **Proof of completion**, tap a photo tile.
2. Take the photo the tile asks for. The tile shows the photo and a check mark.
3. Repeat for each tile that is not yet captured.

RESULT

Each proof tile shows its item as captured.

Take photos that show what the tile asks for, clearly enough for someone who was not there. Your facility manager, and later an auditor, sees these photos.

6.8 Clear the verification gate and complete the job

The *verification gate* keeps a job from being completed until its proof has been captured. **Complete & log to compliance** shows a lock and stays unavailable until all required items are in.

IN-HOUSE TECHNICIAN, CONTRACTOR'S TECHNICIAN · IPAD OR IPHONE · WORKS OFFLINE

1. Check that every step is marked done.
2. Check that every tile under **Proof of completion** is captured.
3. Tap **Complete & log to compliance**.

RESULT

The job is verified. Zylergy Facilities writes its compliance entry: who did the work and with what credential, when, what was done, and the proof. If you are offline, the job is held on the device and sent when you are back online.

The entry is written automatically. It also records each gate you cleared, who verified the job, and against which checklist. These records form the job's *verification trail* in the audit pack.

6.9 Adaptive guidance

With *adaptive guidance*, a guided checklist shows more or less detail for a step, depending on the technician's skill and the job. The proof the job requires and the verification gate stay the same.

Adaptive guidance is still a short checklist with manual references. It does not replace the repair procedure in the manufacturer's documentation, which remains the authority.

6.10 Hands-free guidance

With *hands-free guidance*, you follow the checklist and capture results by voice or with smart glasses. If hands-free use stops or is not available, continue the job on your iPad or iPhone from where you left it.

IN-HOUSE TECHNICIAN, CONTRACTOR'S TECHNICIAN · SMART GLASSES OR VOICE

BEFORE YOU BEGIN

- You have a supported hands-free device, set up for your account.
- You have started the job and confirmed the asset.

1. Ask for the current step, or look at it in the glasses.
2. Do the work the step describes.
3. Mark the step done by voice or with your device's control.
4. When the step asks for a reading, speak the value.
5. Check the value that is shown back.
6. Capture the required photos with the glasses or on your iPad or iPhone.
7. Complete the job when every item of proof is captured.

RESULT

The job is completed through the verification gate, as on the touch screen.

⚠ CAUTION

Distraction near moving or energized equipment. Looking at a screen near rotating, energized or hot equipment can cause injury. Read the step, put the device in a secure place, then do the work.

6.11 Quality scores for completed jobs

Each completed job gets an automatic *quality score*, based on the job's checklist, readings and proof. The score is recorded with the job's compliance entry. Facility managers can use it to see where work or guidance needs attention. Zylergy Facilities also uses the scores to improve maintenance schedules and procedures over time.

The photos and verified outcomes of completed jobs are used to fine-tune Zylergy's vision models. The setting **Help our vision models to become better at detecting parts** is on by default for your whole organization. Only your administrator can change it. Your organization's customer agreement sets the terms for how its data is used.

6.12 Work offline at the asset

Once the job is on your device, you can do these steps without a signal: scan the tag, open the asset brain and the manual pages, follow the checklist, enter readings, take photos and complete the job. The app shows **Offline — will sync** and sends your work when the connection returns. The compliance entry is written and the work queue is updated after the job has synchronized.

> NOTE
> Your facility manager sees the job as verified only after your device has synchronized. If you complete a job offline, reconnect as soon as you can.

7 CHAPTER 7

The compliance record and audit packs

IN THIS CHAPTER

- Open the compliance record 41
- What the compliance record shows 42
- Read a compliance entry 43
- How the record is kept 44
- Export an audit pack 44
- Produce a regulatory pack 45
- Scheduled attestations 45
- Automated audit exports 46

The *compliance record* holds the compliance entries for an asset or a site. For each obligation, it shows the governing authority, the interval, when it was last completed, when it is next due, its status and its proof. Each closed work order writes its entry automatically.

7.1 Open the compliance record

FACILITY MANAGER, COMPLIANCE OFFICER · WEB CONSOLE

1. In the header, choose the building in the building selector.
2. Click **Compliance**.
3. At the top of the page, check when the record was last updated.

RESULT

The compliance record for the building opens (Figure 7-1).

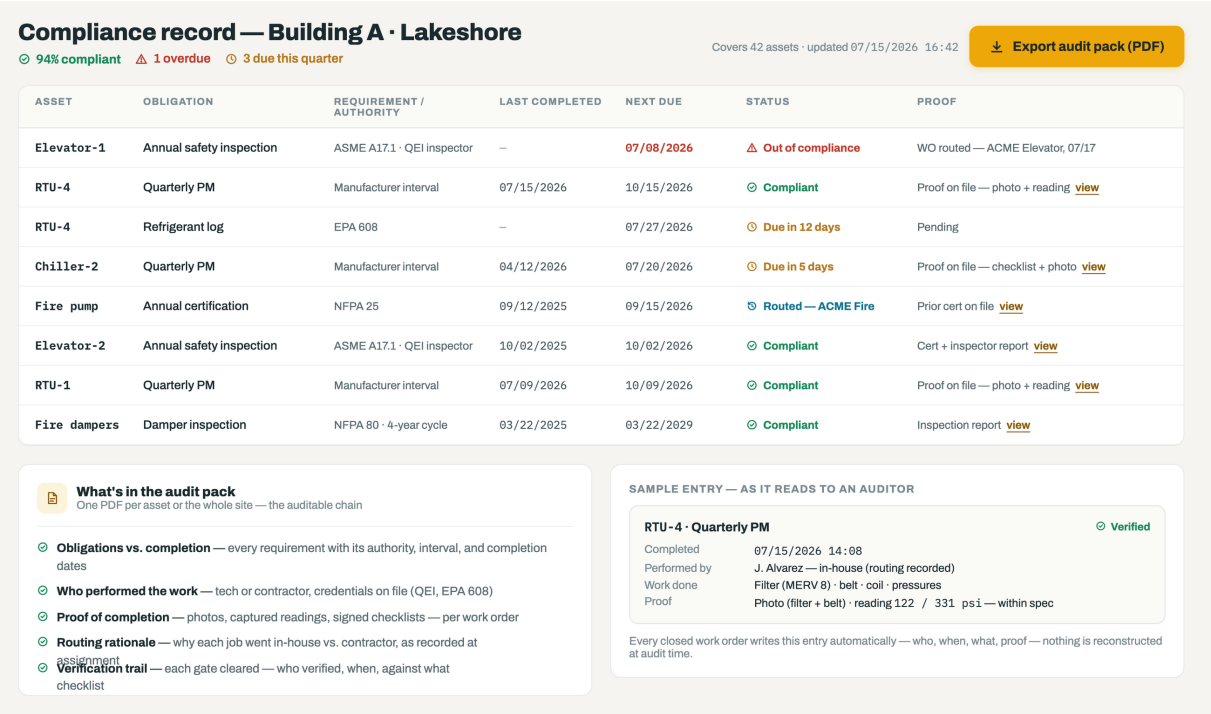


Figure 7-1 The compliance record for a building, with the audit pack contents and a sample entry for a completed quarterly PM. Sample data.

7.2 What the compliance record shows

The top of the page shows the building and a summary of its compliance: the share of obligations that are compliant, the number overdue and the number due this quarter. It also shows how many assets the record covers and when it was last updated. **Export audit pack (PDF)** is at the top right.

Table 7-1 Columns of the compliance record

COLUMN	WHAT IT SHOWS
Asset	The asset ID.
Obligation	What is required, for example **Annual safety inspection**, **Quarterly PM**, **Refrigerant log**, **Annual certification** or **Damper inspection**.
Requirement / authority	The governing authority, for example **Manufacturer interval**, **ASME A17.1 · QEI inspector**, **EPA 608**, **NFPA 25** or **NFPA 80 · 4-year cycle**.
Last completed	When the obligation was last completed.
Next due	When it is next due. Past dates are highlighted.

Status	For example **Compliant**, **Due in 12 days**, **Routed — ACME Fire** or **Out of compliance**.
Proof	What is on file, for example **Proof on file — photo + reading**, **Inspection report** or **Pending**, with **view** to open it.

7.3 Read a compliance entry

A *compliance entry* is the record Zylergy Facilities writes when a job closes. An auditor sees the entry as you do.

Table 7-2 What a compliance entry records

FIELD	WHAT IT RECORDS
Completed	The date and time the job was completed.
Performed by	Who did the work, in-house or contractor, with their credential where the obligation requires one, and a note that the routing was recorded.
Work done	What was done, from the checklist.
Proof	The photos and readings captured, with each reading and whether it was within its acceptance range.
Status	**Verified** once the job cleared its verification gate.

FACILITY MANAGER, COMPLIANCE OFFICER · WEB CONSOLE

1. On the compliance record, find the asset and obligation.
2. In the **Proof** column, click **view**.
3. Read the fields and look at the proof.

RESULT

The entry opens with its fields and its proof.

Entries also hold the routing rationale for the work order and, where the job has one, its quality score (“Quality scores for completed jobs” on page 39).

7.4 How the record is kept

The compliance record is *append-only* and tamper-evident. Entries can be added but not edited or deleted, and a correction is written as a new entry linked to the original. Each entry is attributed to the person or process that wrote it.

Zylergy Facilities writes these to the record:

- Each closed work order, with who, when, what and the proof.
- Each routing decision and its rationale, including the choice between in-house, a known contractor and the marketplace.
- The verification trail of each job: each gate cleared, who verified it, when, and against which checklist.
- The quality score of each completed job.

If your organization uses Zylergy Facilities with an existing CMMS, verified completions and their compliance entries are also written back to the CMMS. Zylergy Facilities keeps the full record either way.

7.5 Export an audit pack

An *audit pack* is a PDF that shows obligations against completed work, for an asset or a whole site, with the proof behind each item. Use it when an auditor, an insurer, a building owner or an authority having jurisdiction asks you to show compliance.

FACILITY MANAGER, COMPLIANCE OFFICER · WEB CONSOLE

1. Open the compliance record for the building.
2. Click **Export audit pack (PDF)**.
3. Save or share the PDF.

RESULT

You have one PDF for the site, with the contents listed in Table 7-3.

The audit pack can also be produced for a single asset.

Table 7-3 What is in an audit pack

SECTION	CONTENTS
Obligations against completion	Each obligation with its governing authority, interval and completion dates.
Who performed the work	The technician or contractor for each job, with the credentials on file, such as QEI or EPA 608.

Proof of completion	The photos, captured readings and checklists for each work order.
Routing rationale	Why each job went in-house or to a contractor, as recorded at assignment.
Verification trail	Each gate cleared: who verified it, when, and against which checklist.

The audit pack names the governing authority of each obligation it covers. The auditor decides whether to accept it.

7.6 Produce a regulatory pack

A *regulatory pack* covers one governing authority across your sites, for example all elevator inspections under ASME A17.1 in your portfolio. An audit pack covers one asset or one site. Zylergy Facilities assembles regulatory packs from the compliance record.

COMPLIANCE OFFICER · WEB CONSOLE

1. Open the portfolio overview.
2. Start a new regulatory pack.
3. Choose the governing authority.
4. Choose the sites to include, or all sites.
5. Generate the pack.

RESULT

The regulatory pack covers the obligations under that authority at the sites you chose, with completion, proof and the verification trail.

7.7 Scheduled attestations

An *attestation* is a scheduled statement of your compliance status for a building owner or an authority. Zylergy Facilities produces it from the compliance record. A compliance officer sets which attestations are produced and how often. To set one up, see the *Zylergy Facilities Admin Guide* (ZY-FAC-ADG-01), chapter “Audit and export.”

7.8 Automated audit exports

Audit exports for the portfolio can also run automatically on a schedule. They are set up in the web console. See the *Zylergy Facilities Admin Guide* (ZY-FAC-ADG-01), chapter “Audit and export.”

8

CHAPTER 8

Portfolio overview

IN THIS CHAPTER

- Open the portfolio overview 48
- The figures at the top 48
- The sites table 49
- Act on what needs attention 49
- Recent activity 50
- Drill into a site or an asset class 50
- Analytics by site, asset class and contractor 50

The portfolio overview shows compliance and work across the sites you can see (Figure 8-1). Where something needs attention, it links to the work order or to routing. Facility managers, portfolio administrators and compliance officers use it as their starting point.

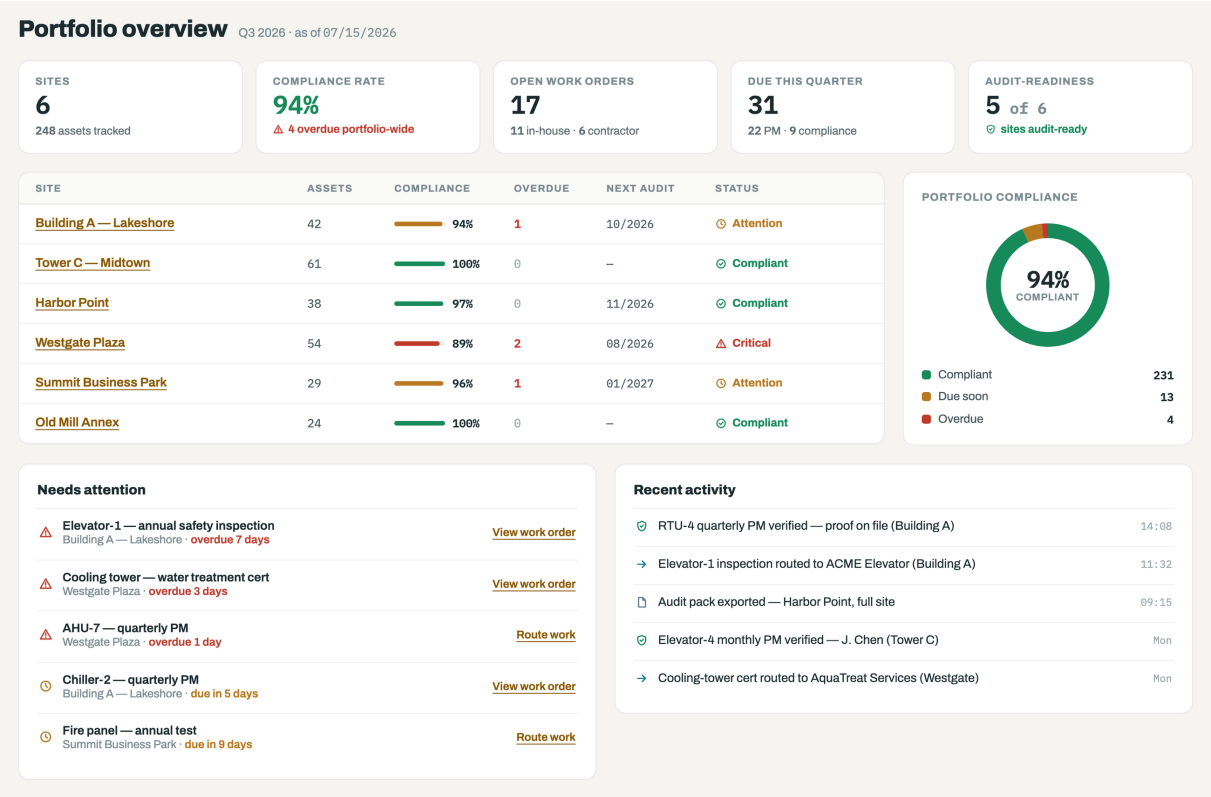


Figure 8-1 The portfolio overview with six sites, the compliance donut, items needing attention and recent activity. Sample data.

8.1 Open the portfolio overview

To open the portfolio overview, click **Overview** in the header. **Portfolio overview** opens and shows the quarter and the date of the figures.

8.2 The figures at the top

Table 8-1 Figures on the portfolio overview

FIGURE	WHAT IT SHOWS
Sites	The number of sites, and the number of assets tracked across them.
Compliance rate	The share of obligations that are compliant across the portfolio, and the number overdue.
Open work orders	The number of open work orders, split between in-house and contractor.

Due this quarter	The number of obligations due this quarter, split between PM and compliance.
Audit-readiness	How many sites are ready for an audit.

8.3 The sites table

Table 8-2 Columns of the sites table

COLUMN	WHAT IT SHOWS
Site	The site name. Click it to open that site.
Assets	The number of assets at the site.
Compliance	The site's compliance percentage, with a bar.
Overdue	The number of overdue obligations.
Next audit	The month of the site's next audit, where one is set.
Status	**Compliant**, **Attention** or **Critical**.

Next to the table, **Portfolio compliance** shows the share of obligations that are **Compliant**, **Due soon** and **Overdue** across the portfolio, with the count for each.

8.4 Act on what needs attention

Needs attention lists the most urgent overdue or at-risk obligations across the portfolio, with the site and how overdue or how soon due each one is.

FACILITY MANAGER · WEB CONSOLE

1. On the portfolio overview, find the item under **Needs attention**.
2. If the item already has a work order, click **View work order**.
3. If it does not, click **Route work** and route it (Chapter 5).

RESULT

You are on the work order or the routing page for the item.

8.5 Recent activity

Recent activity lists what has happened across the portfolio, newest first: jobs verified with proof on file, work routed to contractors, audit packs exported. Each line names the asset or site and shows the time.

8.6 Drill into a site or an asset class

To see the detail behind the overview, click a site name to open that site. You can also open a figure to see it by site and by asset class, for example all elevators or all rooftop units in the portfolio.

8.7 Analytics by site, asset class and contractor

The portfolio overview also reports analytics across sites:

- Compliance and audit-readiness by site and by asset class.
- Preventive maintenance completion across sites.
- Contractor service levels: how contractors perform against their service agreements.
- Marketplace activity: work offered, bid and awarded through the marketplace.

9

CHAPTER 9

For contractors

IN THIS CHAPTER

- How contractors work with Zylergy Facilities 52
- Set up your contractor account 52
- Qualification 52
- Ratings 53
- Receive and review a request for proposal 53
- Submit a bid 53
- Accept a request for proposal 53
- Scoped access: what you can see 54
- Do the work 54
- Raise a dispute 54

Contractors are outside companies, such as elevator, fire protection or mechanical service firms, that do work for a facility operator through Zylergy Facilities. Work reaches a contractor in one of the three ways in Table 9-1.

> NOTE
> Your technicians do the work in the Zylergy Facilities app (“Do the work” on page 54).

9.1 How contractors work with Zylergy Facilities

Table 9-1 How work reaches a contractor

ROUTE	WHAT HAPPENS
Routed directly	The facility manager routes a work order to you, usually under a service agreement on file. You get access to the asset at routing and do the work.
Request for proposal from one operator	The facility manager sends you a work order as a request for proposal. You get access to the asset when you accept it, and then do the work.
Marketplace	The work order is offered to qualified contractors. You review it and bid. If you are awarded the work, you get access to the asset and do the work.

In each case, your technician does the work in the Zylergy Facilities app, with the guided checklist, the proof and the verification gate described in Chapter 6. The compliance entry goes to the operator's compliance record.

9.2 Set up your contractor account

CONTRACTOR

1. Open the invitation or sign-up link you received.
2. Enter your company's details.
3. Add the people in your company who will use Zylergy Facilities.
4. Add your company's credentials, for example QEI or EPA 608 certifications.
5. Add the service agreements you hold.

RESULT

Your contractor account is set up. Your technicians can sign in to the app as described in "Sign in to the app" on page 6.

9.3 Qualification

Before you can receive requests for proposal through the marketplace, your company must be qualified. Qualification checks that you hold the credentials the work requires. Work that requires a credential, such as a certified elevator inspection, is offered only to contractors with that credential on file.

9.4 Ratings

Your company receives ratings for the marketplace work it completes. Facility managers see your rating when they compare bids.

9.5 Receive and review a request for proposal

CONTRACTOR

1. Open the request for proposal.
2. Review the asset brain for the asset: its identity, its manuals and its maintenance log.
3. Review the scope and the checklist in the task package.
4. Check the schedule the work must meet.

RESULT

You know what the work involves and can decide whether to bid or accept.

9.6 Submit a bid

CONTRACTOR

1. Open the request for proposal from the marketplace.
2. Enter your bid.
3. Submit the bid.

RESULT

Your bid is with the facility manager, who compares the bids and awards the work.

Bidding is subject to the marketplace's controls against fraud and abuse.

9.7 Accept a request for proposal

If a facility manager sends you a request for proposal, accept it before the work starts. You get access to the asset when you accept.

9.8 Scoped access: what you can see

Your company and your technicians see only the assets you are authorized for. You get access to the asset of a work order:

- At routing, when the work order is routed to you directly.
- On acceptance, when you accept a request for proposal.
- On award, when you win marketplace work.

Each grant is recorded, and the operator can audit it.

9.9 Do the work

Your technician does the work as an in-house technician does:

1. Find the work order in the app (“Find the work assigned to you” on page 34).
2. At the asset, scan and confirm it, and start the job (“Start a job at the asset” on page 34).
3. Follow the guided checklist and record readings (“Follow the guided checklist” on page 35, “Record readings” on page 36).
4. Capture proof and complete the job through the verification gate (“Capture proof” on page 37, “Clear the verification gate and complete the job” on page 38).

The compliance entry names your company and your technician, with the credential on file.

9.10 Raise a dispute

If you disagree with the outcome of marketplace work, for example an award, a rating or whether work was accepted, you can raise a dispute. Disputes are handled under the marketplace terms.

10 CHAPTER 10

Screen reference

IN THIS CHAPTER

- App screens 55
- Web console screens 58
- The audit pack 61

Each entry gives the purpose of a screen, how to get there, what is on it and what you can do there. Where a figure shows the screen, the entry refers to it.

10.1 App screens

Sign-in

Purpose	Signs you in to the app.
How to get there	Open the app when you are not signed in.
What is on it	**Work email**, **Continue**, a note on single sign-on, the offer of Face ID after the first sign-in, and a pointer to the join link in your invitation.
Actions	Enter your email and continue. Complete single sign-on or enter a 6-digit code.
Figure	Figure 2-1
More	“Sign in to the app” on page 6

First run

Purpose	Asks for camera access the first time you sign in.
How to get there	Shown once, after your first sign-in.
What is on it	What the camera is used for, **Enable the camera** and **Not now — I'll type it in**.
Actions	Allow the camera, or continue without it and search for assets instead.
Figure	Figure 2-2
More	"Allow the camera at first run" on page 8

Home

Purpose	Shows your assigned work and what changed.
How to get there	Tap **Home** in the bottom bar.
What is on it	Work orders assigned to you, **Pick up where you left off**, and what changed since you last looked.
Actions	Open a work order or resume paused work.
Figure	None
More	"Find your way around the app" on page 9

Scan

Purpose	Identifies an asset by its QR tag or by pointing the camera at it.
How to get there	Tap **Scan** in the bottom bar.
What is on it	The camera view, the asset found with its ID, class and location, and a way to search instead.
Actions	Scan a tag, point at an asset, choose between candidates, search, and confirm the asset.
Figure	None
More	"Scan an asset's QR tag" on page 15, "Identify an asset by pointing the camera" on page 16

Asset brain

Purpose	Shows one asset's details, documents, history and status.
How to get there	Scan and confirm an asset, or search for it.
What is on it	How it was identified, the offline state, the asset ID, class and location, the status, **Make**, **Model**, **Serial** and specifications, **Manuals**, **Purchase invoice** and **Maintenance log**.
Actions	**Start scheduled task**, **Open full manual (PDF)**, and open each card.
Figure	Figure 3-1
More	"Read the asset brain" on page 17

Guided checklist

Purpose	Guides a job step by step and collects its proof.
How to get there	On the asset brain, tap **Start scheduled task**.
What is on it	The asset and job title, the offline state, **Checklist** with progress, each step with its manual page, reading fields with the acceptance range, and **Proof of completion** tiles.
Actions	Open a manual page, mark steps done, enter readings and take photos. **Complete & log to compliance** and **Open full manual (PDF)**.
Figure	Figure 6-1
More	Chapter 6

Menu, notifications and settings

Purpose	Notifications, settings and other items that are not about one asset.
How to get there	Tap **Menu** in the bottom bar.
What is on it	Manuals, **Notifications**, your account and settings, and **Help**.
Actions	Read notifications, change personal settings and sign out.
Figure	None
More	“Notifications” on page 10, “Personal settings” on page 11

10.2 Web console screens

Console header

Purpose	Moves between the parts of the console and sets the building.
How to get there	At the top of every console page.
What is on it	The tabs **Overview**, **Queue**, **Assets**, **Compliance** and **Sites**, the building selector and your initials.
Actions	Open a tab or choose a building.
Figure	Figure 2-3
More	“The web console” on page 12

Portfolio overview

Purpose	Compliance and work across your sites.
How to get there	Click **Overview**.
What is on it	The figures **Sites**, **Compliance rate**, **Open work orders**, **Due this quarter** and **Audit-readiness**, the sites table, **Portfolio compliance**, **Needs attention** and **Recent activity**.
Actions	Open a site. **View work order** and **Route work**.
Figure	Figure 8-1

More	Chapter 8

Work queue

Purpose	Lists the obligations that need attention in the building.
How to get there	Click **Queue**.
What is on it	The title **Work queue**, the filters **All**, **PM**, **Compliance**, **Warranty** and **All severities**, and the count of obligations. It also has the columns **Asset**, **Obligation**, **Due**, **Type** and **Status**, and the side panel with **Selected asset** and **Compliance status**.
Actions	Filter and select a row. **Create work order** and **Open asset brain**.
Figure	Figure 4-1, Figure 4-2
More	Chapter 4

New work order

Purpose	Creates, routes and schedules a work order.
How to get there	In the work queue, select a row and click **Create work order**. Or click **Route work** on the portfolio overview.
What is on it	The breadcrumb back to the queue and asset, the asset with its status and obligation, **Task package**, **Route the work** with a card for each technician or contractor, **Routing rationale — recorded to the compliance record** and **Schedule the visit**.
Actions	Select a technician or contractor and a slot. **Edit rationale**, **Save draft** and **Route & schedule work order**.
Figure	Figure 5-1
More	Chapter 5

Compliance record

Purpose	The compliance record for a building and the audit pack.
How to get there	Click **Compliance**.
What is on it	The building and its compliance summary, the record with **Asset**, **Obligation**, **Requirement / authority**, **Last completed**, **Next due**, **Status** and **Proof**, what the audit pack contains, and a sample entry.
Actions	**Export audit pack (PDF)**, and **view** the proof for an entry.
Figure	Figure 7-1
More	Chapter 7

Assets

Purpose	The assets of the building, and the asset brain for each in the web console.
How to get there	Click **Assets**, or click **Open asset brain** in the work queue.
What is on it	The assets of the building. For each, the asset brain shows identity and specifications, manuals, purchase invoice, maintenance log and compliance status, as in the app.
Actions	Open an asset brain or an asset's manuals.
Figure	None
More	"Read the asset brain" on page 17

Sites

Purpose	The sites in your portfolio and the buildings in each.
How to get there	Click **Sites**, or click a site name on the portfolio overview.
What is on it	The sites and their buildings.
Actions	Open a site.
Figure	None
More	“The sites table” on page 49

10.3 The audit pack

Purpose	The record of compliance for an asset or a site, for people outside Zylergy Facilities.
How to get there	On the compliance record, click **Export audit pack (PDF)**.
What is on it	Obligations against completion, who performed the work, proof of completion, routing rationale and verification trail (Table 7-3).
Actions	Save, print or share the PDF.
Figure	None
More	“Export an audit pack” on page 44

11 CHAPTER 11

Troubleshooting

IN THIS CHAPTER

- Signing in 62
- Identifying assets 63
- Doing the work 63
- Office work 64
- Getting help 65

11.1 Signing in

Table 11-1 Troubleshooting sign-in

WHAT YOU SEE	WHY	WHAT TO DO
“Sign-in needs a signal”	Signing in needs a network connection.	Move to where you have coverage, or use Wi-Fi. Work already on the device opens read-only until you sign in.
The app or console does not recognize your email address	The address is not on an invitation.	Check the address. If it is correct, ask your administrator to invite you.
The single sign-on page does not open or rejects you	Your company account or its link to Zylergy Facilities has a problem.	Ask your administrator.
No 6-digit code arrives	The code is delayed, or it went to an old cell phone number or email address.	Wait a moment and try again. If the code still does not arrive, ask your administrator to check your cell phone number and email address.

You see the wrong organization in the console	You chose another organization at sign-in.	Sign out and sign in again, and choose the right organization.

11.2 Identifying assets

Table 11-2 Troubleshooting asset identification

WHAT YOU SEE	WHY	WHAT TO DO
No camera view on **Scan**	Camera access is not allowed.	Search for the asset, or allow camera access for Zylergy Facilities in the Settings app on your device.
The QR tag will not scan	The tag is damaged, dirty, poorly lit or not registered.	Clean the tag or add light. Otherwise search for the asset, and tell your facility manager so the tag can be replaced or registered.
The asset on the screen does not match the tag or the nameplate	The tag is on the wrong asset, or the asset record is wrong.	Do not continue. Search for the asset, and tell your facility manager.
Pointing the camera offers several assets	Several assets look alike.	Scan the QR tag instead, or choose the asset whose ID matches.
The asset is not found at all	It is not in the asset registry, or you are not authorized for it.	Tell your facility manager. If the asset should be visible to you, ask your administrator about your access.
A manual is missing from the asset brain	Your organization has no manual for the asset, or you are not authorized to read it.	Tell your facility manager.

11.3 Doing the work

Table 11-3 Troubleshooting jobs

WHAT YOU SEE	WHY	WHAT TO DO
Start scheduled task does not appear	No work order on this asset is assigned to you.	Check Home for your work orders. If the job is not there, ask your facility manager.
Complete & log to compliance is unavailable	A step or an item of proof is missing.	Check that every step is done and every tile under **Proof of completion** is captured.
A reading is outside its acceptance range	The equipment may need attention, or the measurement conditions differ from those the range states.	Record the value as measured and tell your facility manager (“When a reading is out of range or a step cannot be done” on page 37).
Offline — will sync stays on the screen	The device has no connection.	Keep working. Your work is sent when the connection returns.
A completed job does not appear as verified in the console	The device has not synchronized yet.	Reconnect the device and open the app.
Hands-free guidance stops responding	The hands-free device lost its connection or is not supported.	Continue on your iPad or iPhone.

11.4 Office work

Table 11-4 Troubleshooting office work

WHAT YOU SEE	WHY	WHAT TO DO
The work queue looks wrong for your building	The building selector shows another building, or a filter is set.	Check the building selector, and click **All** with **All severities**.
An in-house technician cannot be selected when routing	The obligation requires a credential the technician does not hold on file.	Route to a qualified contractor, or have the credential added to the technician’s record if they hold it.
No contractor is recommended	No contractor with the required credential and a service agreement is on file.	Offer the work on the marketplace, or ask your facility manager or portfolio administrator to add a qualified contractor.

The compliance record does not show a job you know is done	The job was not completed through its verification gate, or the device has not synchronized.	Ask the technician to synchronize. If the job was never completed in the app, complete it there.
An item from your CMMS is missing or different	The connection to the CMMS has not synchronized, or the item conflicts with the record in Zylergy Facilities.	Ask your administrator to check the integration.

11.5 Getting help

- In the app, tap **Menu** > **Help**.
- For your account, your roles or the assets you can see, ask your administrator.
- For the work queue, routing, schedules and obligations, ask your facility manager.
- For a problem with the product itself, contact Zylergy support. In the app, open **Menu** > **Help**, or email support@zylergy.com. Support is available Monday through Friday, 8 a.m. to 6 p.m. US Central time.

Glossary

acceptance range

The range a measured reading must fall within to count as in spec, for example `110–130 PSI`. Each range comes from the manufacturer's documentation.

adaptive guidance

Guidance that shows more or less detail for a step depending on the technician's experience and the job, without changing the proof required.

administrator

The person who manages users, sign-in, settings, integrations and support access, and reviews documents uploaded to the company's library. The matching role is **Admin**. In a small company the shop owner may also be the administrator.

append-only

A record that can be added to but never edited or deleted. A correction is written as a new entry linked to the original.

ASME A17.1

The safety code for elevators and escalators. Zylergy Facilities tracks elevator safety inspections as obligations governed by ASME A17.1.

asset

A serviceable piece of equipment in a building, such as a rooftop unit, chiller, air handler, elevator or fire pump, registered in Zylergy Facilities.

asset brain

Everything Zylergy Facilities knows about one asset in one place: identity and specifications, manuals, purchase invoice, maintenance log and compliance status. You open it by scanning the asset's QR tag.

asset class

A kind of asset, such as rooftop unit, chiller, elevator or fire pump, that shares specification fields and manufacturer intervals.

asset record

The registry entry for one piece of equipment: make, model, serial number, location, who owns it, specifications and history. In Zylergy Facilities the asset brain is built on the asset record.

attestation

A scheduled statement of an operation's compliance status, produced from the compliance record for a building owner or an authority.

audit pack

A PDF that Zylergy Facilities exports for an asset or a site. It shows obligations against completed work, who did the work and with what credential, the proof captured, the routing rationale and the verification trail.

award

The facility manager's choice of the bid that wins a marketplace work order. The awarded contractor gains access to the asset.

back office

The people who work in the web console: planning, dispatch, quotes, customers, supervision and reports. The matching role is **Back office**. In Zylergy Field this is the shop owner and any office staff. In Zylergy Facilities it is facility managers, dispatchers and compliance staff. In Zylergy Solar it is sales and service coordination.

bid

A contractor's offer to carry out a work order published to the marketplace.

bill of materials

The list of parts and quantities a repair needs. In Zylergy Solar it is part of the repair package.

building management system (BMS)

An existing building system that monitors equipment and can supply condition data.

building selector

The control at the right of the web console header that shows and changes the building you are working in.

CMMS

Computerized maintenance management system: the system of record many facility teams already use for assets and work orders.

Company Brain

Your organization's governed knowledge in Zylergy: the manuals, records, notes and photos the product draws on, with access set by your administrator. Each product presents it where you work: the document library in Zylergy Field, the asset brain in Zylergy Facilities, and the manuals and history on the asset record in Zylergy Solar.

compliance entry

The record Zylergy Facilities writes automatically when a job closes: who did the work and with what credential, when, what was done, and the proof.

compliance officer

The person who owns regulatory packs and attestations across a portfolio. Works in the web console with the **Back office** role.

compliance record

All compliance entries for an asset or a site, shown on the **Compliance** tab of the web console. It is append-only.

condition-based trigger

Maintenance raised by the condition a connected unit or an existing building system reports, rather than by a fixed interval.

contractor

An outside company, such as an elevator or mechanical service firm, that carries out work routed to it under a service agreement, with access limited to the assets it is authorized for.

contractor's technician

A technician employed by a contractor who carries out the contractor's work in the Zylergy Facilities app.

credential

A certification a person must hold to perform regulated work, such as a QEI elevator inspector credential or EPA 608 certification. Zylergy Facilities uses credentials on file to decide who can be assigned a job.

dispatcher

The person who schedules and routes work.

EPA 608

The US Environmental Protection Agency certification required to handle refrigerants under Section 608 of the Clean Air Act.

facility manager

The person who runs maintenance and compliance for a building or portfolio, walking the building with the app and working in the web console.

governing authority

The code, standard or regulation an obligation comes from, such as ASME A17.1 or NFPA 25.

guided checklist

The step-by-step checklist a technician follows on the Zylergy Facilities app, with links to the manual pages for each step and the proof the step requires.

hands-free guidance

Following guidance and capturing results by voice or with smart glasses instead of the touch screen.

in-house technician

A technician employed by the facility operator, as opposed to a contractor's technician.

lockout/tagout

The procedure of isolating equipment from its energy sources, locking and tagging the isolation point, and verifying zero energy before work begins.

manufacturer's documentation

Installation, operation, service and parts documents published by the equipment manufacturer.

marketplace

The Zylergy Facilities function through which qualified contractors receive requests for proposal, submit bids and are awarded work.

nameplate

The plate or label on equipment that carries its make, model, serial number and ratings.

NFPA 25

The standard for inspection, testing and maintenance of water-based fire protection systems. Zylergy Facilities tracks fire pump certification under it.

NFPA 80

The standard for fire doors and other opening protectives; Zylergy Facilities tracks fire damper inspections under it.

obligation

A maintenance, inspection, compliance or warranty requirement on an asset, with a due date and a governing authority. Obligations feed the work queue.

offline

Working without a network connection. Work you record offline is saved on the device and synchronized when the connection returns.

point-and-identify

Identifying an asset by pointing the camera at it instead of scanning its QR tag. Zylergy Facilities asks you to confirm when the match is uncertain.

portfolio administrator

The person who sets cross-site compliance, routing and marketplace policy for a portfolio of sites. Works with the **Back office** role.

preventive maintenance (PM)

Scheduled maintenance carried out at set intervals to keep equipment in service, such as a quarterly PM.

proof

The photos and readings a technician must capture before a Zylergy Facilities job can be completed.

QEI

Qualified Elevator Inspector: the credential required to perform certified elevator inspections.

QR tag

A label with a QR code bound to one asset record. Scanning it opens that asset.

qualification

The check that a contractor holds the required credentials before it may bid on marketplace work.

quality score

The automatic score given to a completed job from its proof and how it was carried out, recorded with the job.

reading

A measured value recorded for a checklist item, such as suction pressure, checked against its acceptance range as you enter it.

regulatory pack

A compliance pack assembled for a regulation or authority across sites, as distinct from the audit pack for one asset or site.

request for proposal (RFP)

A work order offered to contractors to accept or bid on: to one known contractor (RFP handoff) or to qualified contractors through the marketplace.

RFP handoff

Sending a work order to one known contractor as a request for proposal.

role

What a user can do in Zylergy: **Admin**, **Back office**, **Field tech** or **Customer**, given per user by the administrator. A user can hold more than one role.

routing

Assigning a work order to an in-house technician or a contractor. Zylergy Facilities blocks assignments that would give certified work to someone without the required credential.

routing rationale

The recorded reason for a routing decision. It is written to the compliance record and appears in the audit pack.

scoped access

Access limited to exactly the assets a person or contractor is authorized for.

service agreement

A contract between the operator and a contractor, recorded with the contractor, that covers certain assets or sites.

site

A location that groups assets: a building or campus in Zylergy Facilities, a homeowner's property in Zylergy Solar.

sync

The transfer of changes between your device and Zylergy when a connection is available.

task package

The scope, checklist and manual pages that Zylergy Facilities generates from the asset brain for a work order, so the person doing the work has what they need.

technician

A person who works at the equipment with the app. The matching role is **Field tech**.

verification gate

The check that keeps a job from being completed until its proof has been captured.

verification trail

The sequence of proof and approvals behind a completed job, as shown in the audit pack.

walk-through

The facility manager's round of the building with the app on iPad or iPhone, scanning assets and reviewing what is due at each one.

web console

The browser-based part of a Zylergy product, used by the back office instead of the app.

work order

An assignment of work on an asset or site to a technician or contractor.

work queue

The list of work that needs attention, sorted so the most urgent comes first: in Zylergy Facilities, obligations and due work; in Zylergy Field, approvals, reviews, exceptions and overdue maintenance.

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