



AssetPlanner™

Maintenance Planner

Quick Start Guide

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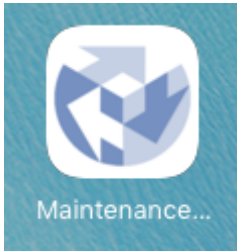
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Getting Started: Login

Login Page

Ensure that you have **MaintenancePlanner™** app downloaded in your device. This application is available on Apple and Android devices.



Enter your **e-mail address** and the **password** provided to you by Ameresco (same login info used on desktop view) and then click **Login**.

Login

Email

Password

Server
assetplanner.com

Login

Forgot your password?
Enter your Email address above then press the Reset Password button to receive further instructions.
[Reset Password](#)

***Tip:** If you ever forget your password you can click on the "I forgot my password" link. You will receive an e-mail with instructions on how to re-set your password.*

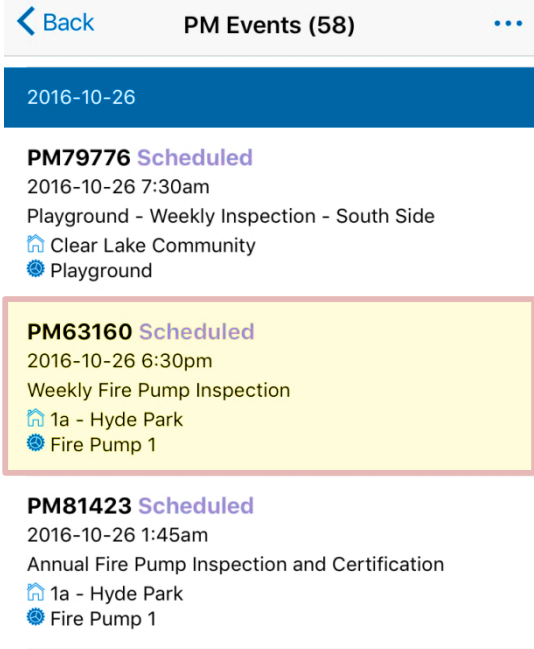
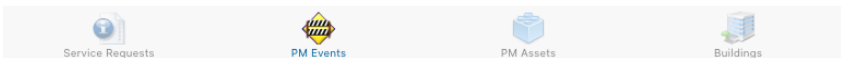
Navigating the App

Navigating the App

MaintenancePlanner

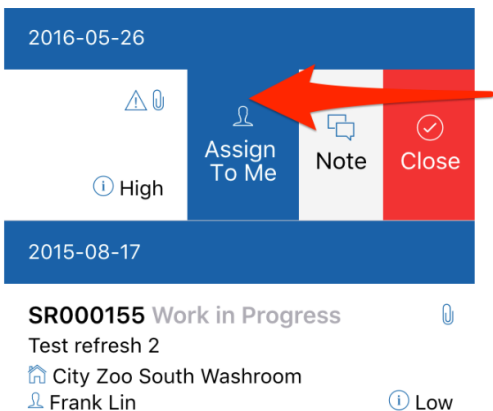
MaintenancePlanner allows you to access your AssetPlanner Service Requests, Asset Components, and Asset Classes.

Events and requests assigned to you will appear as a slightly different color on the screen from all other open requests you have access to view.



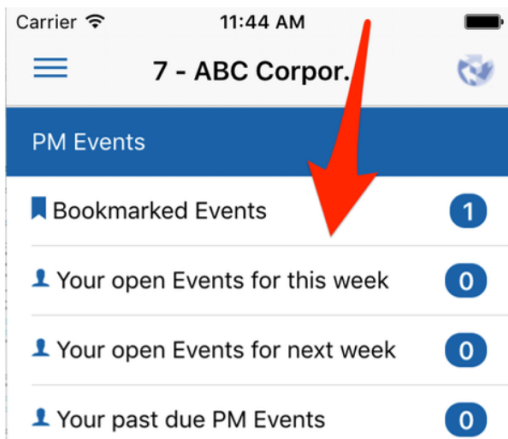
Swipe left/right

When viewing lists, slide an item right for actions and left for bookmarking.



Refresh Stats

On the dashboards, use the pull down gesture to refresh the data at any time.

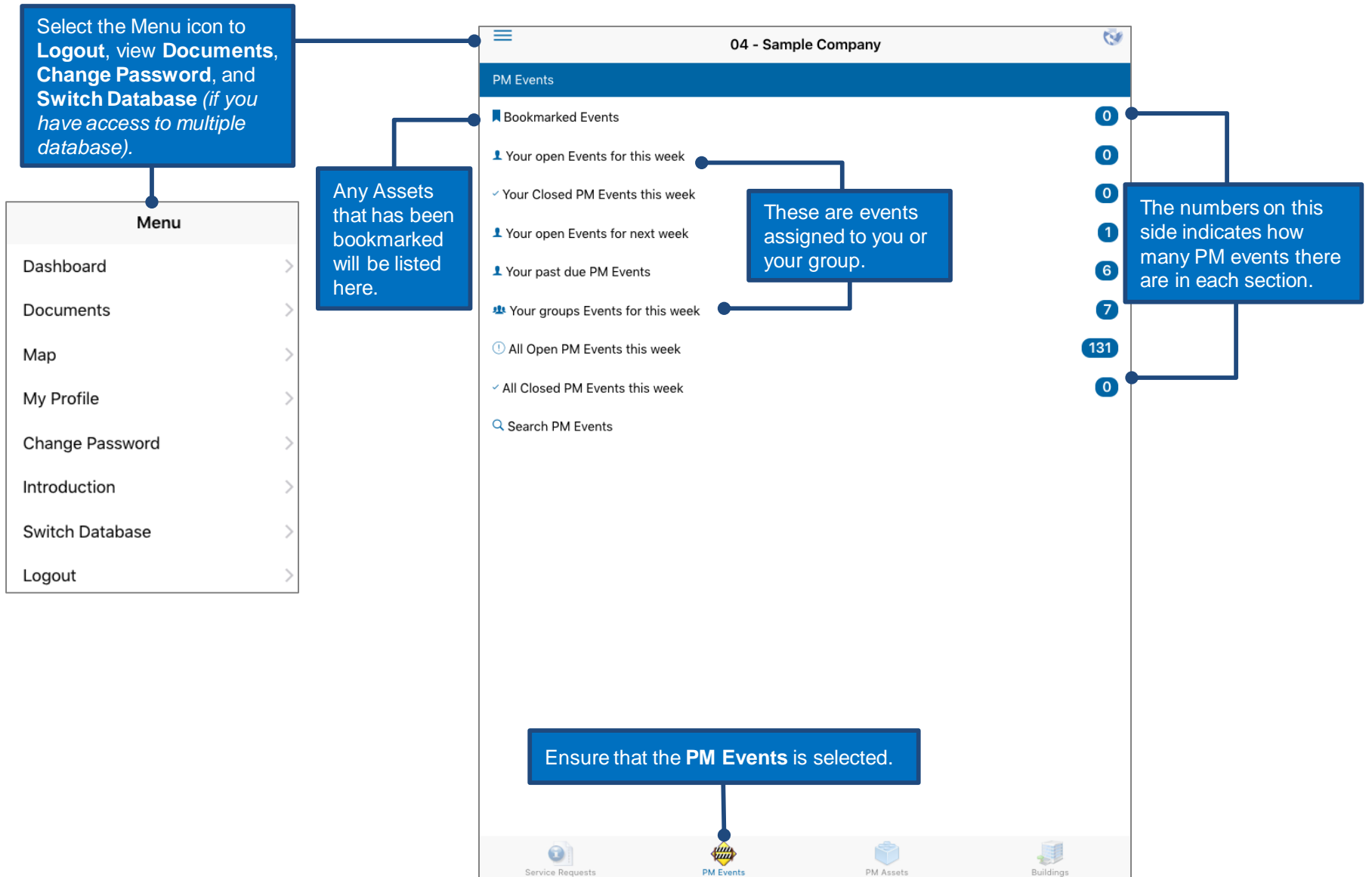


ICONS DEFINED

- Facility
- Asset
- Category
- Attachment
- Asset Meter(s)
- Notes attached
- Urgent or High Priority
- Pending Approval

Preventative Maintenance

Preventative Maintenance Home Screen



PM Event Page

PM Procedure is placed below the Summary field. Tap the PM procedure to view the complete details.

If changes are made, **Save** button will appear.

Use the **Action Menu** to quickly update some fields.

Check List shows the number of items there are. Tap to view the complete details.

View existing **Notes** or add new Notes to the PM Event.

View, Take a Photo, or Upload a Photo from your library in this section.

The screenshot displays the PM Event page for PM 103214. At the top, there is a 'Back' button and the PM ID 'PM 103214'. Below this is the 'Summary (Task 44)' section, which includes the title 'Annual Air Compressor Inspection' and a list of tasks: '1. Drain air and water from tank. 2. Close valve and restart. 3. Look, listen and touch. Det...', 'Check List (1)', 'Packaged Air Conditioning Units', and 'Fire Station #1 - Building'. The 'Location' field is also visible. Below the location are sections for 'Notes (1)', 'Pictures/Attachments (0)', and 'Pictures/Attachments from Task (1)'. On the right side, there is an 'ACTION MENU' with options: 'Bookmark', 'Assign to me', 'Set Work in Progress', 'Create an SR', 'Forward via Email', 'View Activity', 'Add a Note', 'Add a Picture', 'Add Labour Hrs', 'Completed', and 'Triggers/Reminders'. A 'Save' button is located at the top right of the main content area. An inset window shows the 'PM 103214 Check List' with a title 'DRAIN AIR AND WATER FROM TANK. (MANDATORY)' and a question 'Is the area described free of snow/ice, grip applied to the surface?'. Below the question are four options: 'Completed?' (checked), 'Action Required?', 'Pictures (0)', and 'Comments'. There are two toggle switches on the right side of the check list options.

This inset shows two options for adding photos: 'Library' with a photo icon and 'Camera' with a camera icon.

PM Event Page

Status
Scheduled

Scheduled Date
2017-10-22 08:00:00

Date Completed

Assigned Group

Assigned To

Service Provider

Estimated Time (hrs)

Estimated Cost

Total Cost: \$68.76

This section is where the status, scheduled and complete date can be updated. The assignment areas shows all parties involved or assigned to complete the schedule event.

The PM Cost area will show Estimated time by hours, Estimated Cost, and the Total Cost for the PM Event. This is one place to add the Actual time spent completing the event can be entered.

Tapping on the Total Cost field will take you to the history of the PM event cost, if there is any, or add a new cost if necessary.

Back New Cost Save

Total Cost: \$40.00

Date 2017-10-25

Component

Cost Type Labour

Provider Test User

Code

Comments

Base Rate/Cost 40.00

Units Hour

Quantity 1

Cost 40.00

GST2

F&C Mark Up

Add Picture

Search PM Events

04 - Sample Company

PM Events

- Bookmarked Events 0
- Your open Events for this week 0
- Your Closed PM Events this week 0
- Your open Events for next week 1
- Your past due PM Events 6
- Your groups Events for this week 7
- All Open PM Events this week 131
- All Closed PM Events this week 0
- Search PM Events

Select the **Search PM Events** link from the home screen to list/search for old and new PM events.

Type in the PM event number or the key words to start the search. Leave blank if no information is available.

Press the **Search** button once search criteria are entered. Use **Reset** button to clear the fields.

Search Filters

Reset Search

By PM #

Buildings

Summary Contains

Date Range

This week

Status

Assigned Group

Assigned To

Service Provider

Tap the field where the drop down arrows are to view the available options.

PM Events

Enter the PM event number to filter and quickly search for a PM event.



Use the **Back** button to return to the home screen.

PM Events (131)

Search

2017-10-22

PM103214 Scheduled
2017-10-22 8:00am
Annual Air Compressor Inspection
Fire Station #1 - Building
Packaged Air Conditioning Units

PM103214 Scheduled
8:00am
Annual Air Compressor Inspection
Fire Station #1 - Building
Packaged Air Conditioning Units

PM103214 Scheduled
2017-10-22 8:00am
Annual Air Compressor Inspection
Public Library - Building
Packaged Air Conditioning Units

PM98540 Scheduled
2017-10-22 8:00am
Annual Air Compressor Inspection
Public Library - Building
Packaged Air Conditioning Units

SORT OPTIONS

- Newest First
- Oldest First ✓
- Last Updated
- Buildings

Click the **Sort Option** icon to sort the list according to your preference.

Swipe to the right to bookmark an event.



Assign To Me

Note

Complete

Swipe to the left to Assign yourself, Add Notes, and Complete the event.



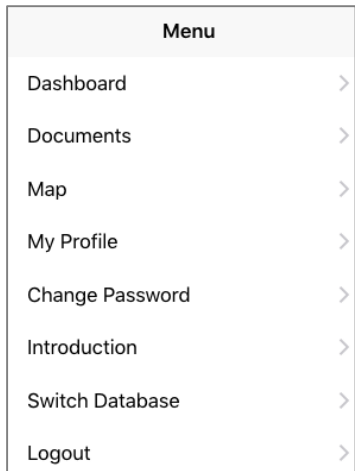
This **Note** icon appears if a note has been added to the PM event.

Tap the PM Event anywhere to open and see the full details.

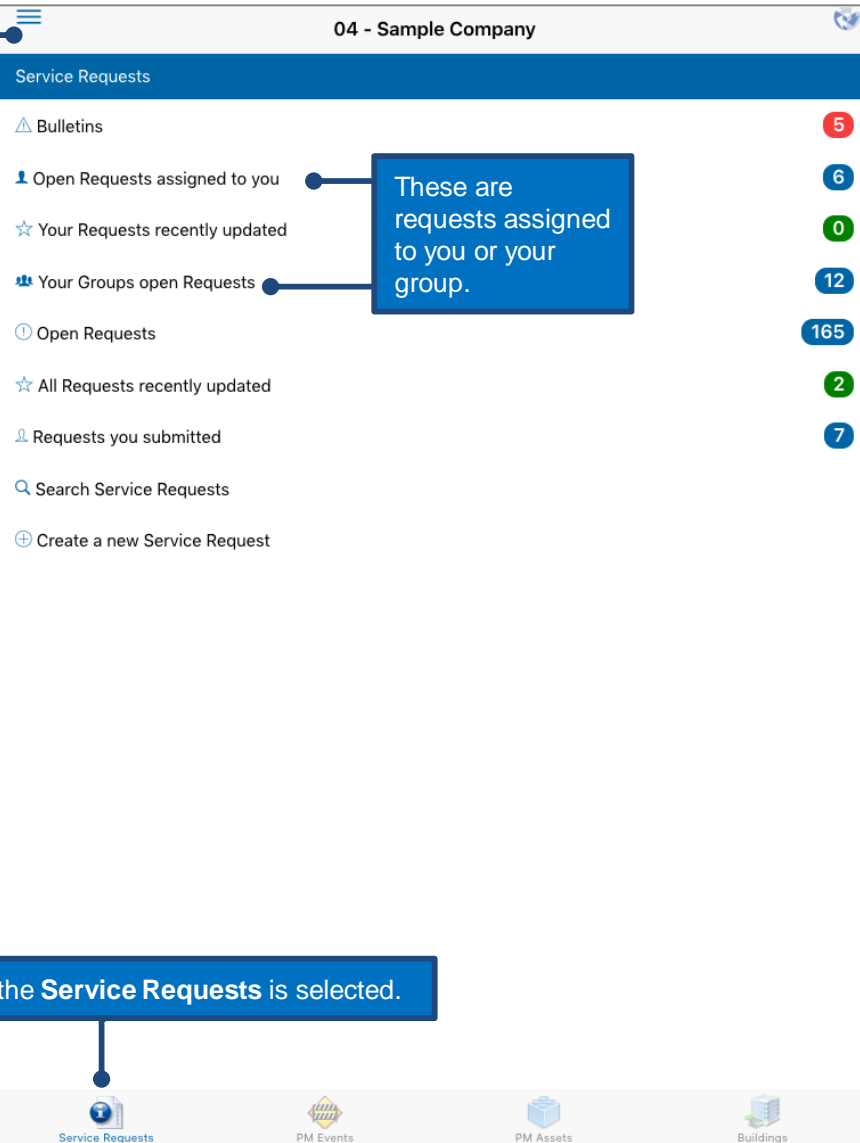
Service Requests

Service Requests Home Screen

Select the Menu icon to **Logout**, view **Documents**, **Change Password**, and **Switch Database** (if you have access to multiple database).



Bulletins are the messages posted by your database administrator.

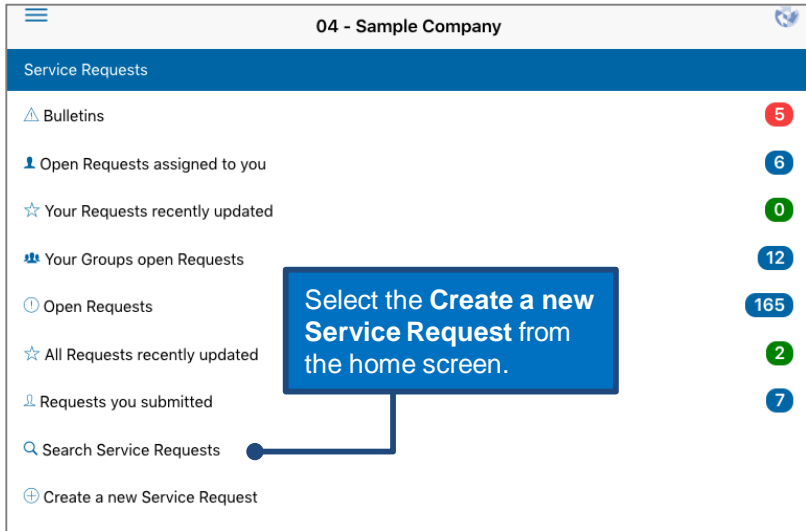


These are requests assigned to you or your group.

The numbers on this side indicates how many requests there are in each section.

Ensure that the **Service Requests** is selected.

Create a Service Request



Back New Request Save

Contact
Mary Dollano

*Phone

Mobile Phone

*Buildings
Tap to choose

*Type of Request
Tap to choose

*Priority
LOW

Requested Completion

CC Email (to copy on notifications)

CUSTOM 1

CUSTOM 2

PM Asset

Location/Room #

*Please enter a description
Enter Description...

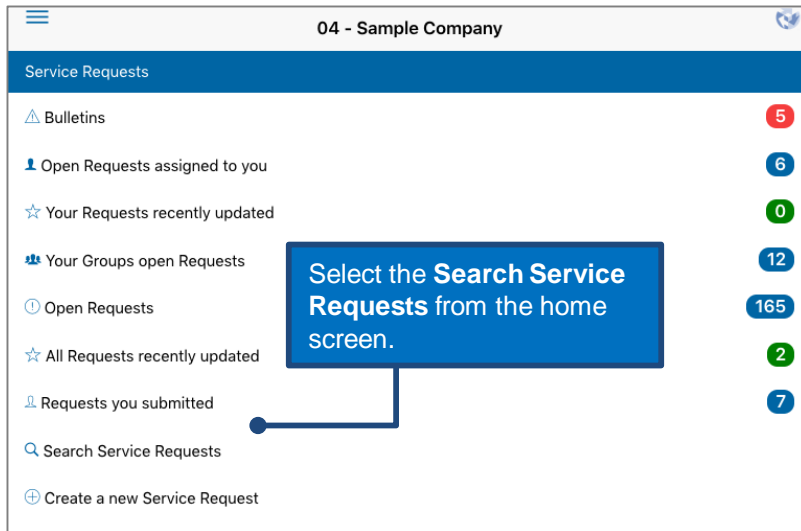
Attach Picture

Press **Save** when complete.

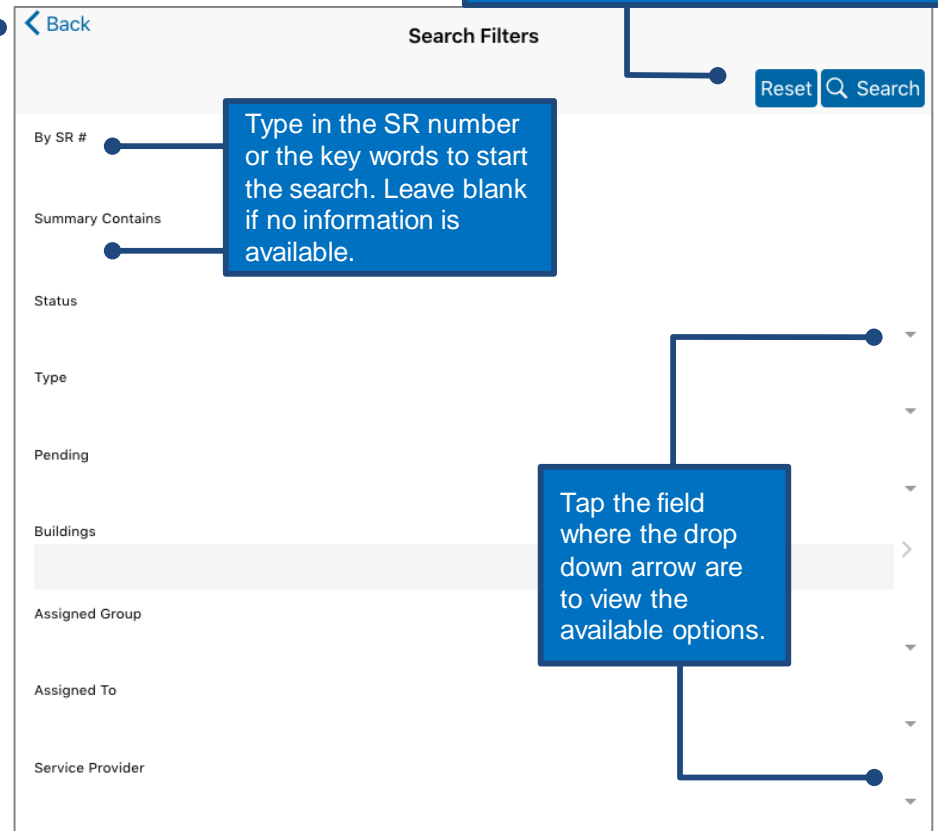
Fill out all the **mandatory fields (*)**. Tap the fields with arrow to view the available options.

Use the **Attach Picture** to attach a file or photo if applicable.

Search Service Request



Use the **Back** button to return to the home screen.



Service Requests

Enter the SR number to filter and quickly search for a Service Request.

The screenshot shows a mobile application interface for managing service requests. At the top, there is a header with a back arrow, the text "Requests (165)", and a search bar. A sort menu is open on the right side, listing various sorting options. The main content area displays a list of service requests, each with a date header, a title, a description, a location, and an assignee. The requests are grouped by date. The first request is SR001671, the second is SR001670, and the third is SR001667. The fourth request, SR001666, is partially visible. The fifth request, SR001665, is highlighted in yellow. At the bottom of the screen, there are three action buttons: "Bookmark", "Assign To Me", and "Close".

Back Requests (165)

Search

Service Requests (Open) for Status New, Work in Progress, Pending

2017-10-13

SR001671 New
Ceilings - Water Stains
01 All Townhouses
Steve Drew

2017-10-06

SR001670 New
Air Quality - Odour Detected - NATURAL GAS
250 Davenport Road - Site
Scott Cripps

2017-09-20

New
v Discoloration
port Road
n

Bookmark Assign To Me Note Close

2017-09-19

SR001667 New
This is a test
Community Centre
Anita Wilson Low

SR001666 New
need to pails of soap
Community Centre
Anita Wilson Low

2017-08-23

SR001665 Pending
VANDALISM - Interior
City Hall - Site
Mary Dollano Low

Click the **Sort Option** icon to sort the list according to your preference.

Swipe to the right to bookmark a SR.

Swipe to the left to Assign to yourself, Add Notes, and Close the request.

Service Request Page

The screenshot displays the Service Request Page interface. On the left, a summary card shows details for a request titled "VANDALISM - Interior" at "City Hall - Site", assigned to "Mary Dollano". The card includes sections for "Notes (0)", "Pictures/Attachments (0)", and "PM Assets". The "Priority" is listed as "Low".

An "ACTION MENU" is visible on the right side of the summary card, containing the following options: Bookmark, Assign to me, Set Work in Progress, Forward via Email, View Activity, Add a Note, Add a Picture, Add Labour Hrs, Close Request, and Triggers/Reminders.

The right side of the page shows a detailed view of the request with the following fields: Priority (Low), Status (New), Pending, Created (2017-10-13 13:04:00), Requested Completion, Scheduled Start Date, Actual Start Date, Date Completed, and Date Closed. Below these are sections for Assigned Group, Assigned To, Service Provider, CC Email, Cost (\$250.00), Work Order, and Purchase Order.

Callout boxes provide the following information:

- Use the Action Menu to quickly update some fields.** (Points to the ACTION MENU)
- This section shows the information for the request given by the requestor.** (Points to the Summary card)
- This section is where the status, scheduled and completed, closed date can be updated. The assignment areas shows all parties involved or assigned to close the request.** (Points to the detailed view fields)
- Tapping on the Cost field will take you to the history of the Service Request cost, if there is any, or add a new cost if necessary.** (Points to the Cost field)

PM Assets

PM Assets Home Screen

Select the Menu icon to **Logout**, view **Documents**, **Change Password**, and **Switch Database** (if you have access to multiple database).

Menu	
Dashboard	>
Documents	>
Map	>
My Profile	>
Change Password	>
Introduction	>
Switch Database	>
Logout	>

04 - Sample Company

PM Assets

- Bookmarked Assets 0
- Search PM Assets
- Scan Bar/QR Code
- Total PM Assets 1706
- Recently Updated 2
- Create a new Asset

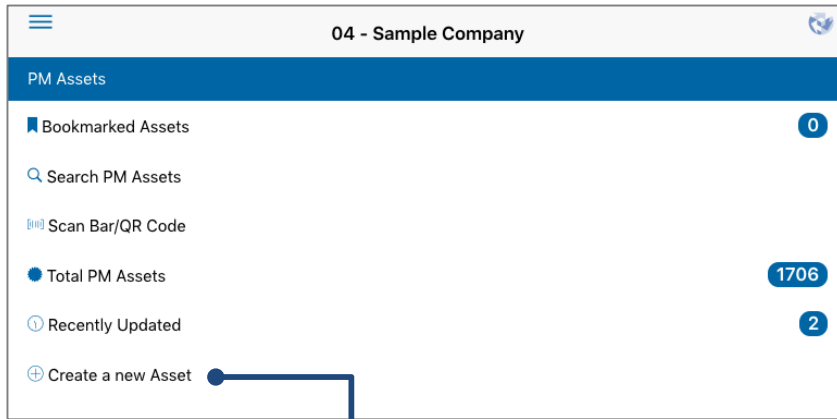
Service Requests PM Events PM Assets Buildings

Any Assets that has been bookmarked will be listed here.

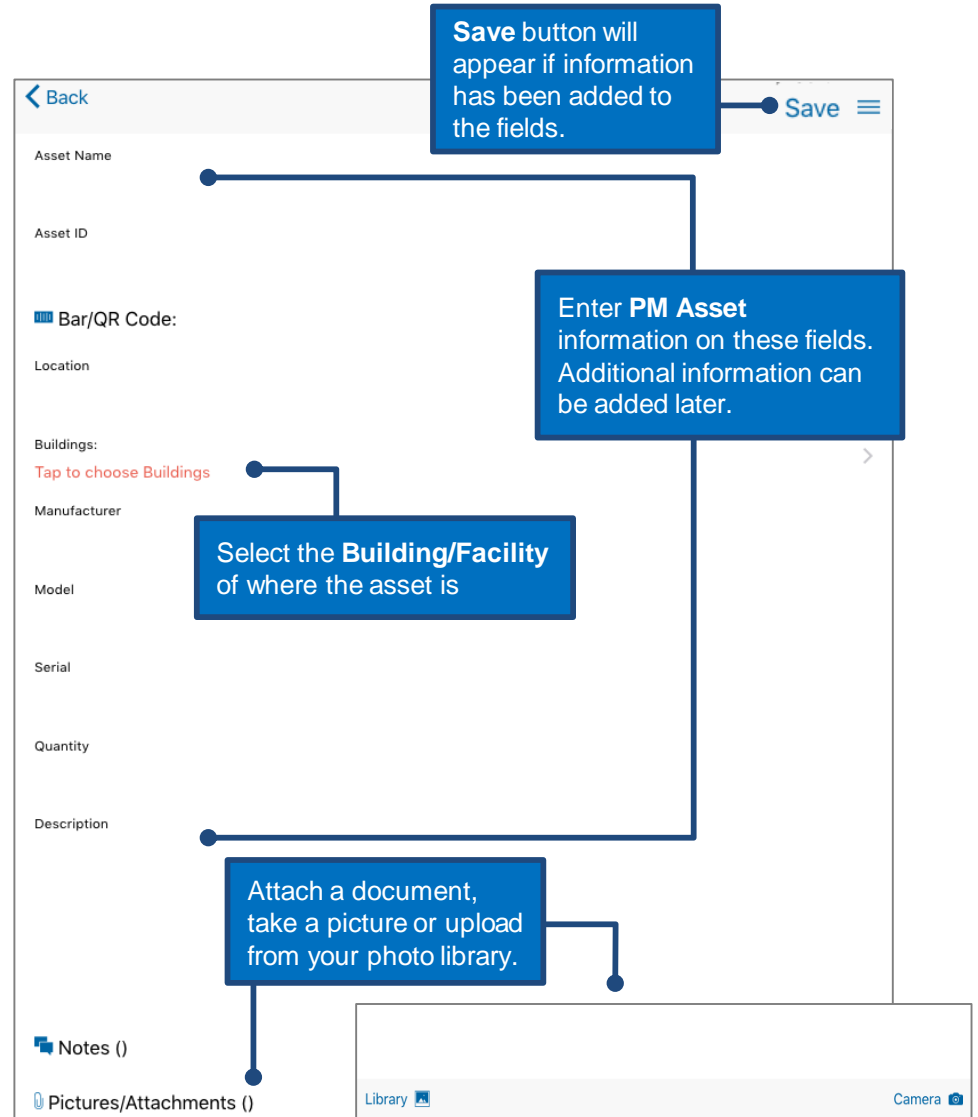
The numbers on this side indicates how many PM Assets there are in each section.

Ensure that the **PM Assets** is selected.

Creating PM Assets



Select **Create a new Asset** from the home screen.



Save button will appear if information has been added to the fields.

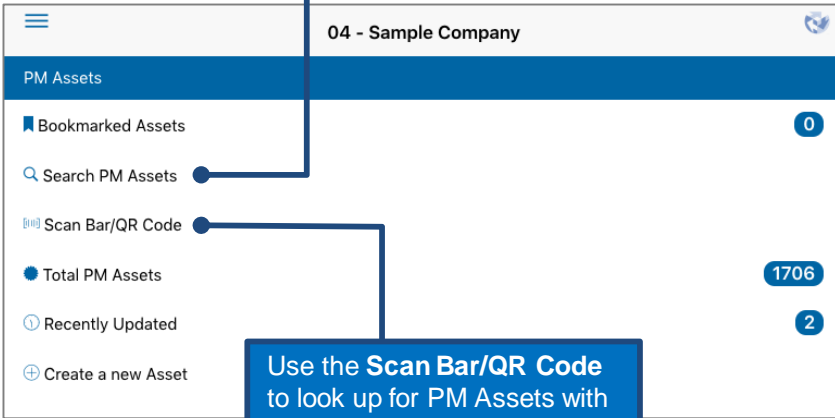
Enter PM Asset information on these fields. Additional information can be added later.

Select the **Building/Facility** of where the asset is

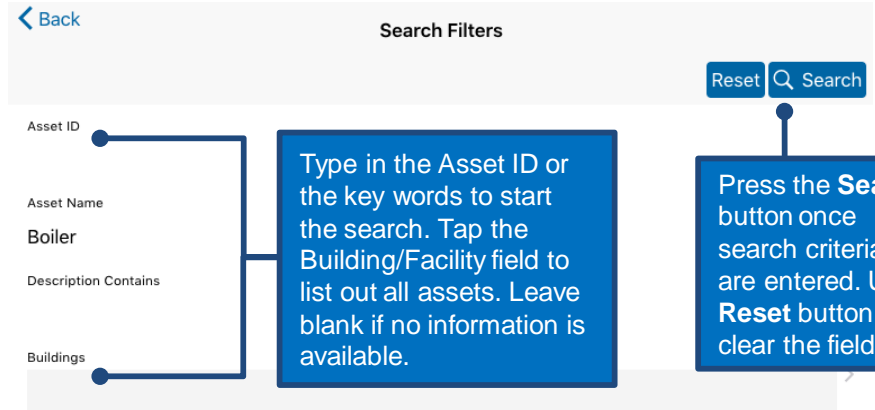
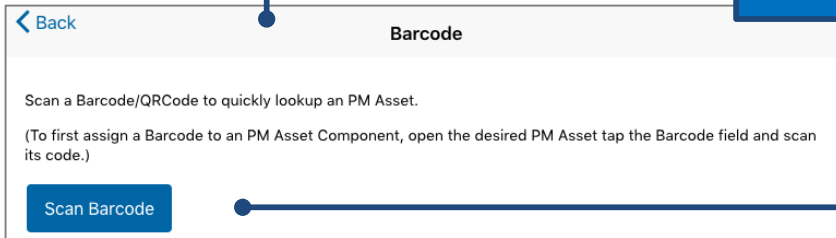
Attach a document, take a picture or upload from your photo library.

Search PM Assets

Select the **Search PM Assets** from the home screen.



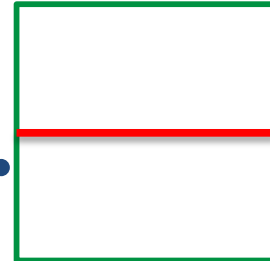
Use the **Scan Bar/QR Code** to look up for PM Assets with barcode assigned on it.



Type in the Asset ID or the key words to start the search. Tap the Building/Facility field to list out all assets. Leave blank if no information is available.

Press the **Search** button once search criteria are entered. Use **Reset** button to clear the field.

Click **Scan Barcode** to begin and place the barcode inside the green box aligning the red line. When find, it will open the Asset page.



PM Assets Page

Use the **Back** button to return to the previous page.

Use the **Search** field to filter down your searching.

The screenshot shows the 'PM Assets (5)' page. At the top left is a 'Back' button with a left-pointing arrow. Below it is a search bar with a magnifying glass icon and the text 'Search'. The main content area is titled 'Boiler' and contains a list of five asset entries. Each entry starts with a blue gear icon followed by the asset name, then 'M1', a wrench icon with the location name, and a house icon with the address. The assets are: 1) 'Boiler 104567-BLR-001' at Champlain Place; 2) 'Boiler 104567-BLR-002' at Champlain Place; 3) 'Boiler B-1' at 250 Davenport Road; 4) 'Hot Water Boiler - Test' at Beaches Recreation Centre - Building; 5) 'Hot Water Boilers' at Police Station. On the right side, a 'SORT OPTIONS' menu is open, listing 'AssetName' (checked with a blue checkmark), 'Buildings', 'Category', and 'Last Updated'. A blue callout box points to the 'Sort Option' icon (three dots) at the top right of the menu. Another blue callout box points to a blue clip icon next to the second asset entry. A third blue callout box points to a blue note icon next to the fifth asset entry.

Click the **Sort Option** icon to sort the list according to your preference.

A **clip** indicates that there is a file or a picture attached to the asset.

This **Note** icon appears if a note has been added to the asset.


PM Assets Page

PM Asset information is stated in this page. Scroll down to view all the available fields. Additional information can be added on the existing assets.

[← Back](#) Test ☰

Asset Name
Test

Asset ID

 Bar/QR Code:

Location

Buildings:
Unit - 5405


Manufacturer


Model

Serial

Quantity


Description

 Notes (0) ➤

 Pictures/Attachments (0) ➤

Status
Active ▼

ACTION MENU

-  Bookmark
- Add a Note
- Add a Picture
- View Activity
- Create an SR
- Show Recent SR's
- Show Recent PM's
- Delete Asset
- Duplicate

Use the **Action Menu** to quickly update some fields.

Facility/Asset Class

Facility/Building Home Screen

Select the Menu icon to **Logout**, view **Documents**, **Change Password**, and **Switch Database** (if you have access to multiple database).

Menu	
Dashboard	>
Documents	>
Map	>
My Profile	>
Change Password	>
Introduction	>
Switch Database	>
Logout	>

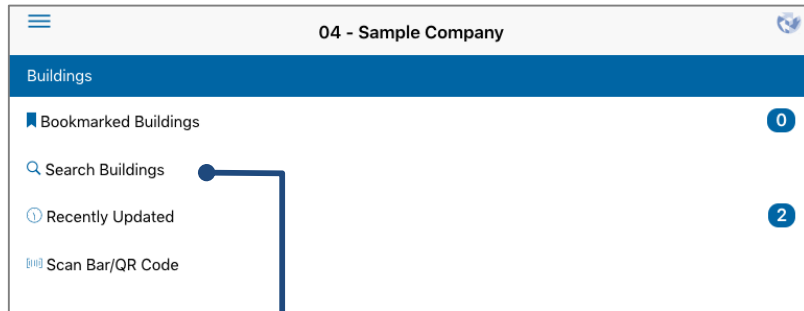
The screenshot shows the '04 - Sample Company' interface. At the top, there is a header with a menu icon and the company name. Below this is a 'Buildings' section with a blue header. Underneath, there are four options: 'Bookmarked Buildings', 'Search Buildings', 'Recently Updated', and 'Scan Bar/QR Code'. On the right side of the 'Buildings' section, there are two circular indicators with the numbers '0' and '2'. At the bottom of the screen, there is a navigation bar with four icons: 'Service Requests', 'PM Events', 'PM Assets', and 'Buildings'. The 'Buildings' icon is highlighted with a blue bar.

Any Facility or Building that has been bookmarked will be listed here.

The numbers on this side indicates how many facilities there are in each section.

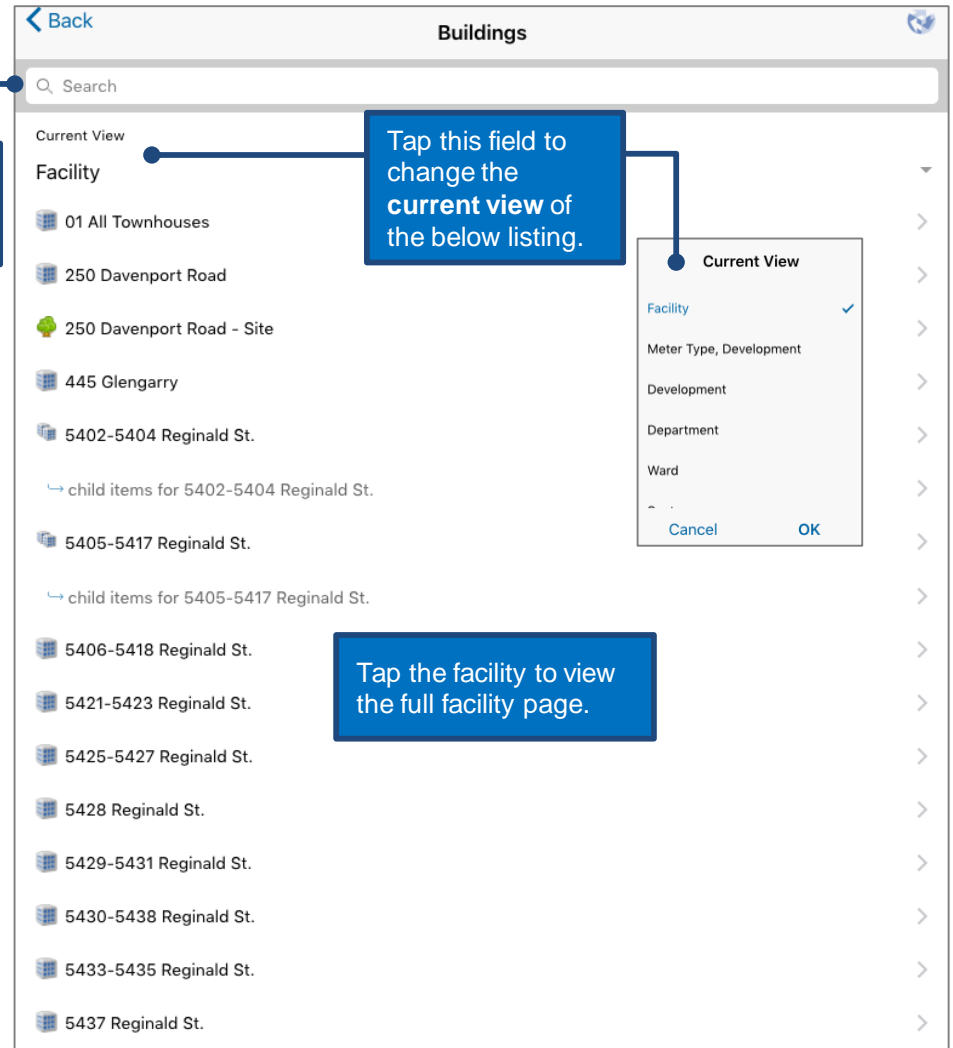
Ensure that the **Facility/Building** is selected.

Search Facility/Building



Select the **Search Facility or Building** from the home screen.

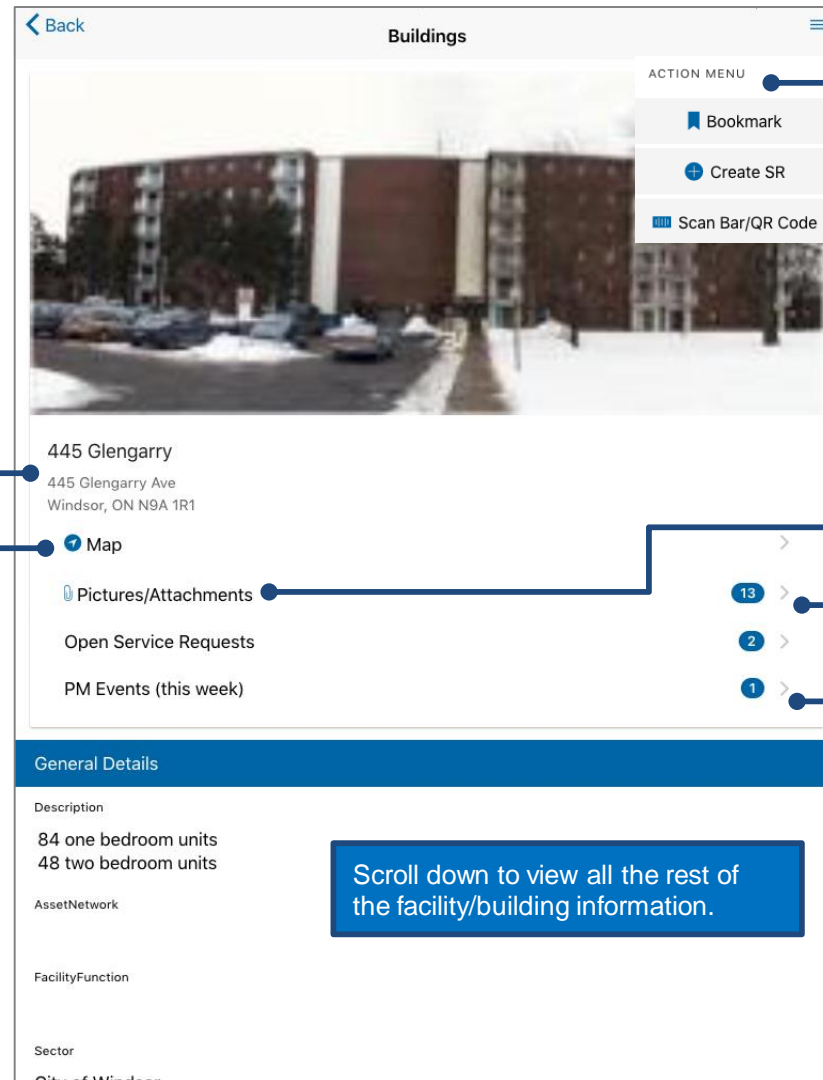
Use the **Search** field to filter down your searching.



Tap this field to change the **current view** of the below listing.

Tap the facility to view the full facility page.

Facility/Building Page



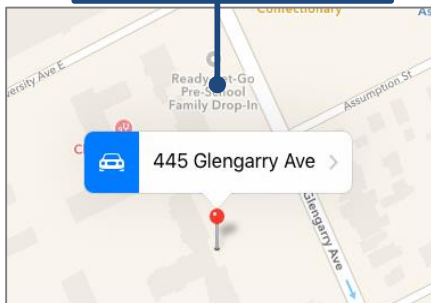
These are the Facility name and its address.

Use the **Action Menu** to bookmark the facility, create an SR, or add or change the facility barcode.

Attach a document, take a picture or upload from your photo library.

The number indicates how much items there are in each links. Tap the field to view the complete listing.

Open the **Map** to see where the facility is located. The location of the pin is based on the address entered in the facility information.



Scroll down to view all the rest of the facility/building information.