AssetPlanner™

Quick Start Guide

AMERESCO ASSET SUSTAINABILITY

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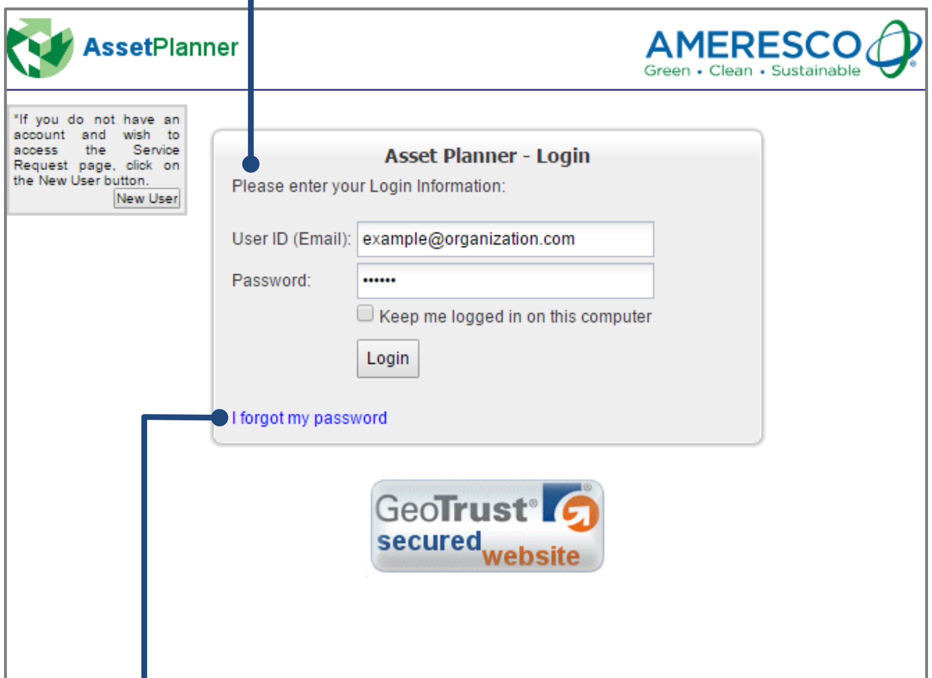
Getting Started:

Web Link & Login

Web Link & Login

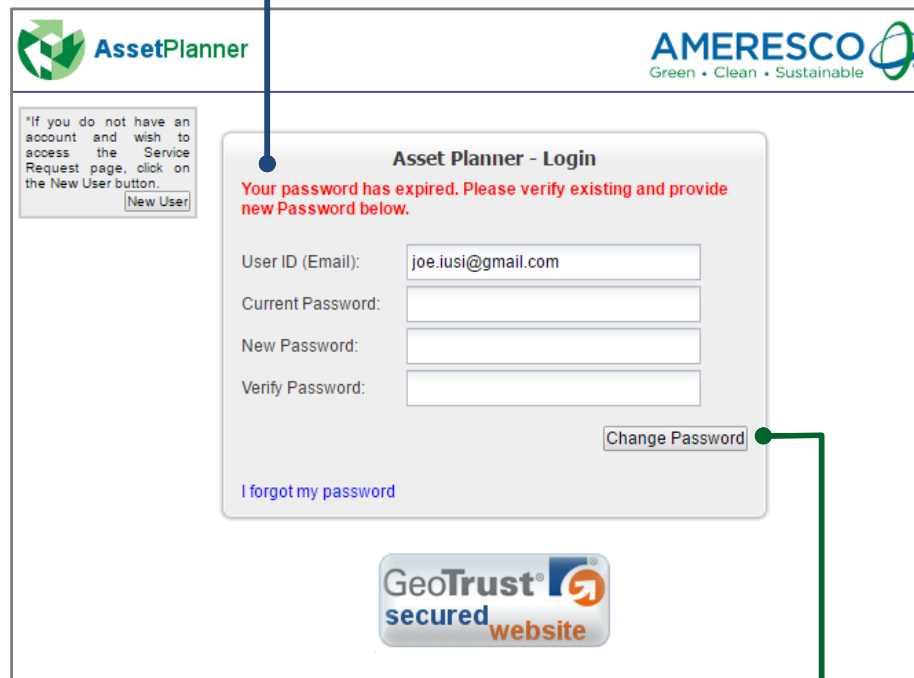
www.AssetPlanner.com

First enter your **e-mail address** and the **password** provided to you by Ameresco and then click **Login**.



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.*

Upon logging in for the first time you will be asked to create a **new password** for your account.

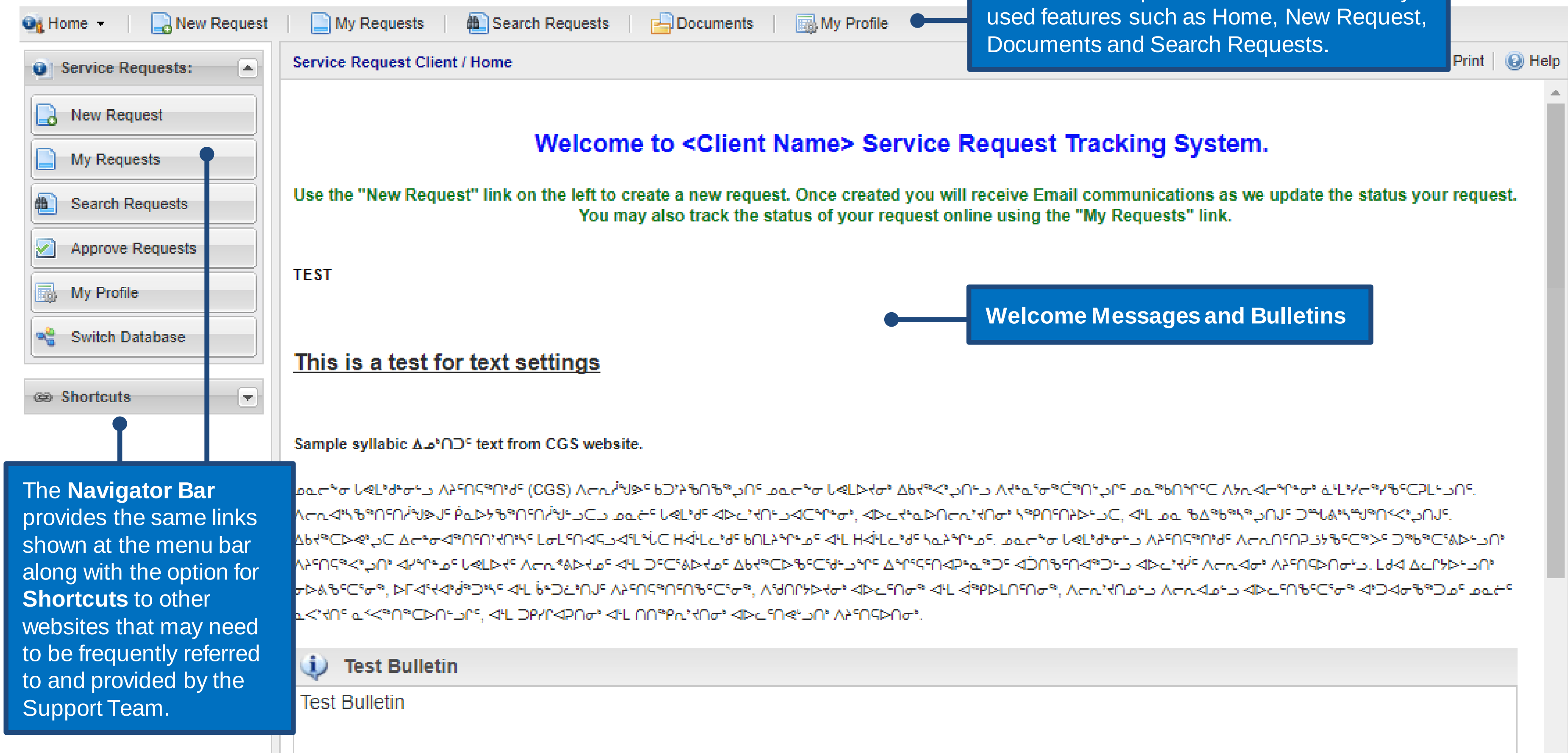


>>To begin our training session click on Change Password and then you will be asked to Accept the terms and conditions.

Navigation

Home Screen Layout

The home page is divided into three main sections:



The **Menu Bar** provides links to commonly used features such as Home, New Request, Documents and Search Requests.

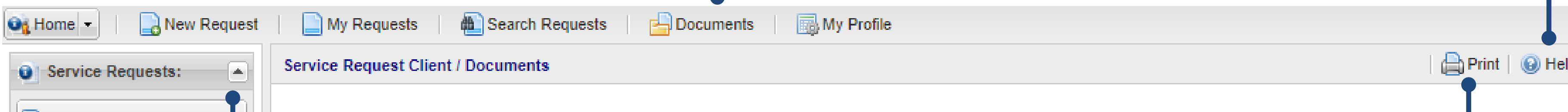
Welcome Messages and Bulletins

The **Navigator Bar** provides the same links shown at the menu bar along with the option for **Shortcuts** to other websites that may need to be frequently referred to and provided by the Support Team.

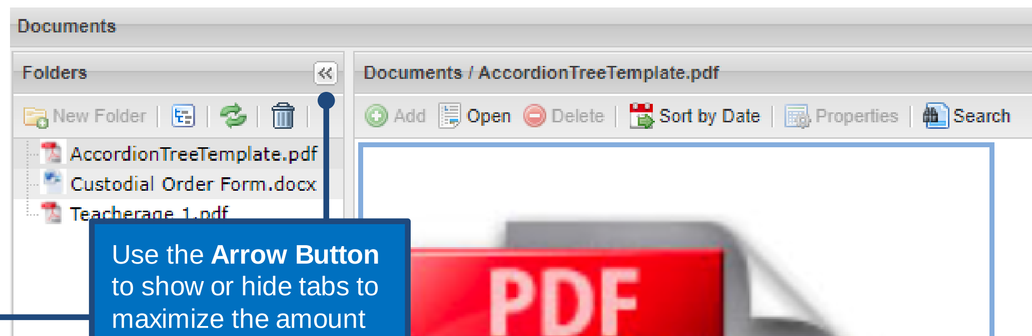
Navigation Tools

The Support team may share various types of documents with the requestors.

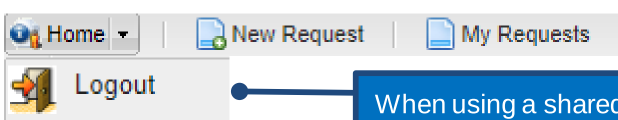
Almost every page in the database has a **Help** button to assist you with features available on the page.



Click the **Print** button to produce a hard copy of any page in the database.



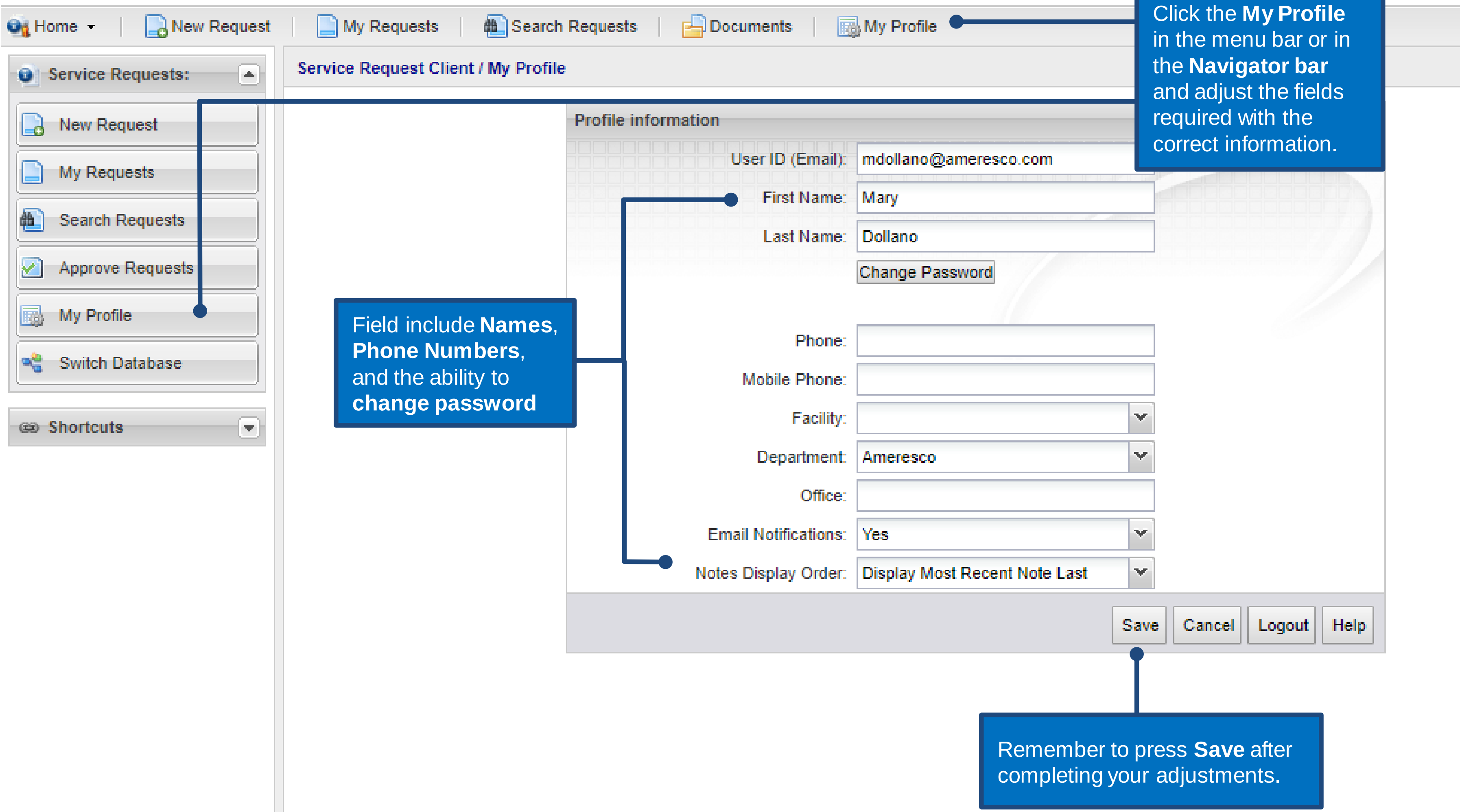
Use the **Arrow Button** to show or hide tabs to maximize the amount of content viewable on your screen.



When using a shared computer make sure to click the **Home** button in the menu bar and then select **Logout** to end your session.

User Profile

There may be times where you need to update your contact information or personal information contained in the database.



Click the **My Profile** in the menu bar or in the **Navigator bar** and adjust the fields required with the correct information.

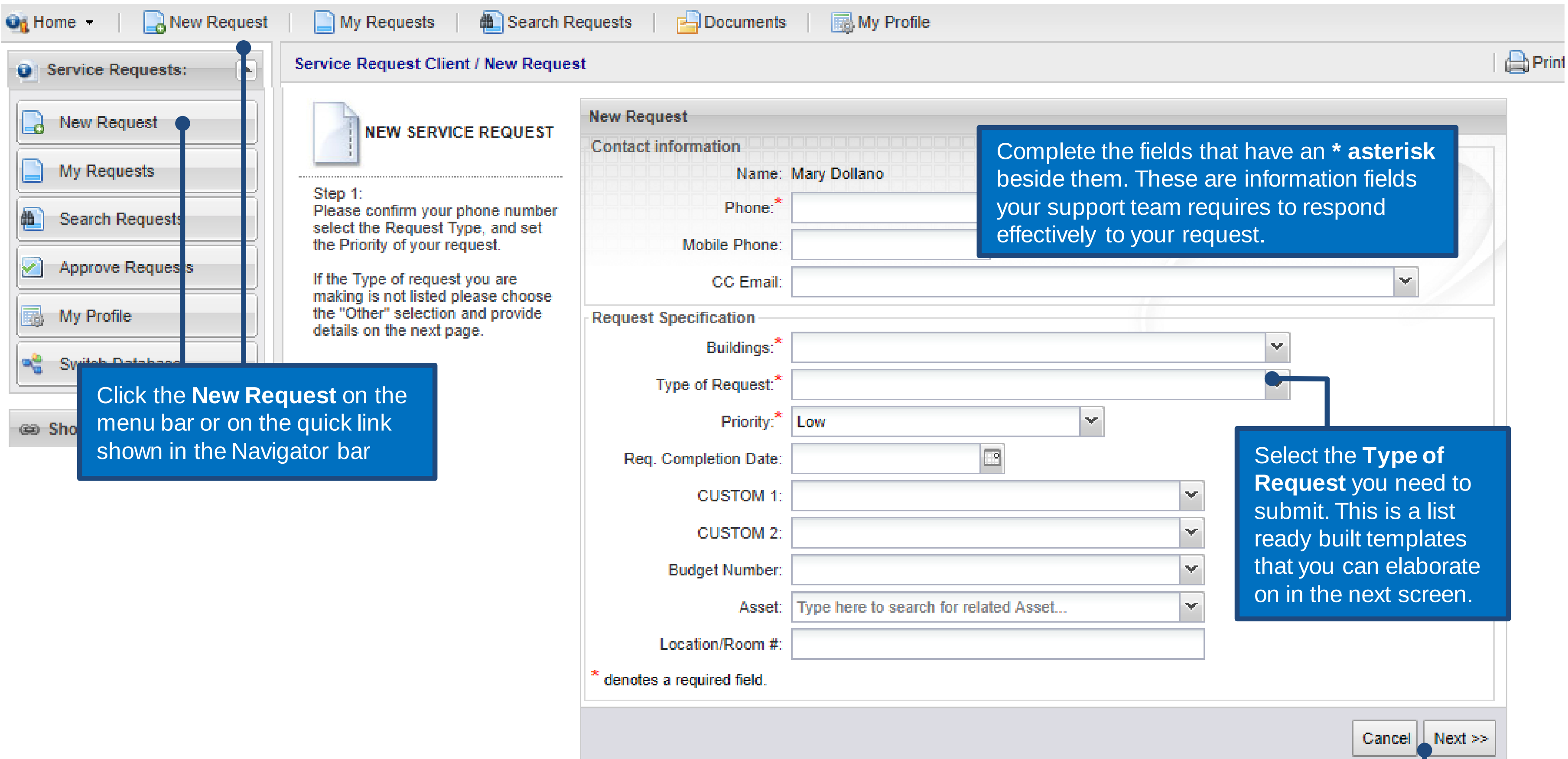
Field include **Names**, **Phone Numbers**, and the ability to **change password**

Remember to press **Save** after completing your adjustments.

Note: *Email address changes should be alerted to your database administrator to update on your behalf.*

Service Request

Create a Service Request



Complete the fields that have an *** asterisk** beside them. These are information fields your support team requires to respond effectively to your request.

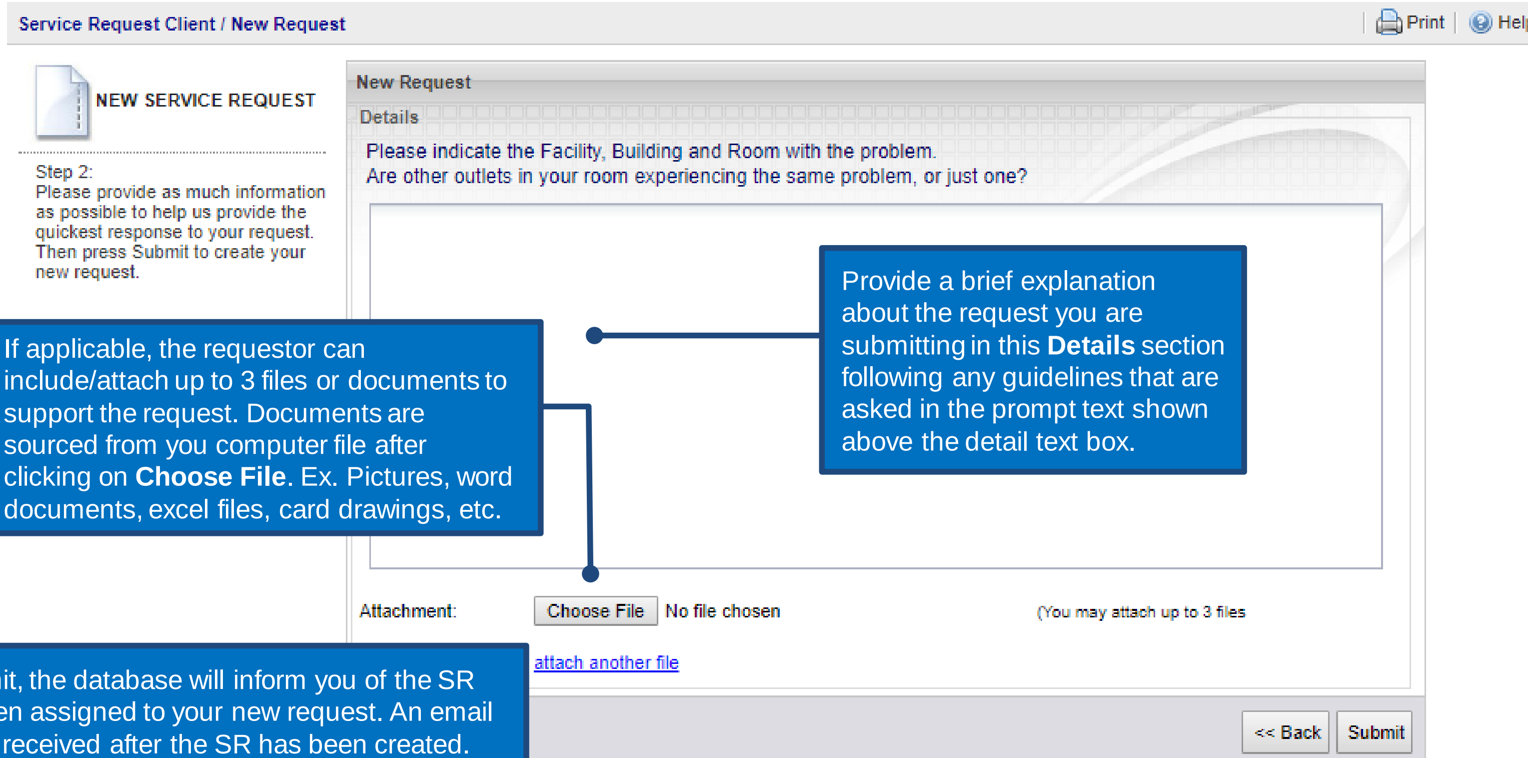
Click the **New Request** on the menu bar or on the quick link shown in the Navigator bar

Select the **Type of Request** you need to submit. This is a list ready built templates that you can elaborate on in the next screen.

Click **Next** after completing the fields in this form.

Create a Service Request

This page allows you to elaborate on the details for the request you are submitting.

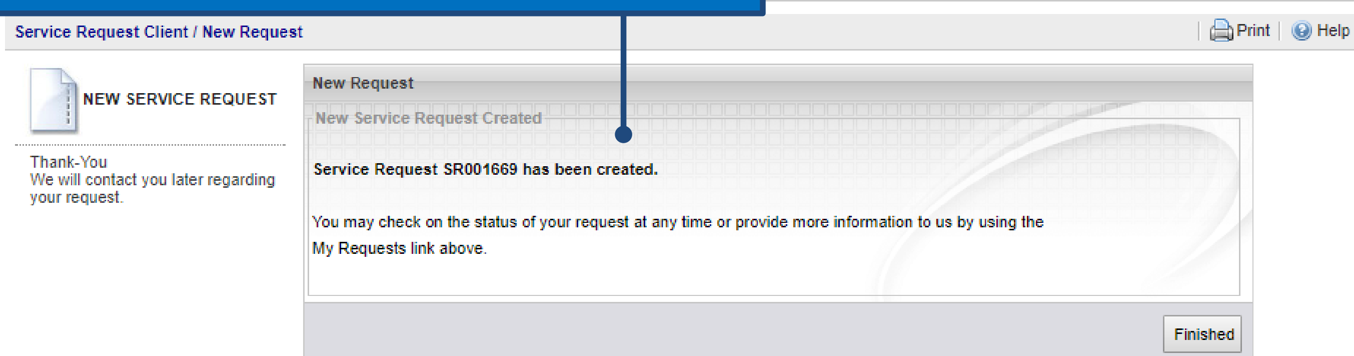


Provide a brief explanation about the request you are submitting in this **Details** section following any guidelines that are asked in the prompt text shown above the detail text box.

If applicable, the requestor can include/attach up to 3 files or documents to support the request. Documents are sourced from you computer file after clicking on **Choose File**. Ex. Pictures, word documents, excel files, card drawings, etc.

After pressing submit, the database will inform you of the SR number that has been assigned to your new request. An email receipt may also be received after the SR has been created.

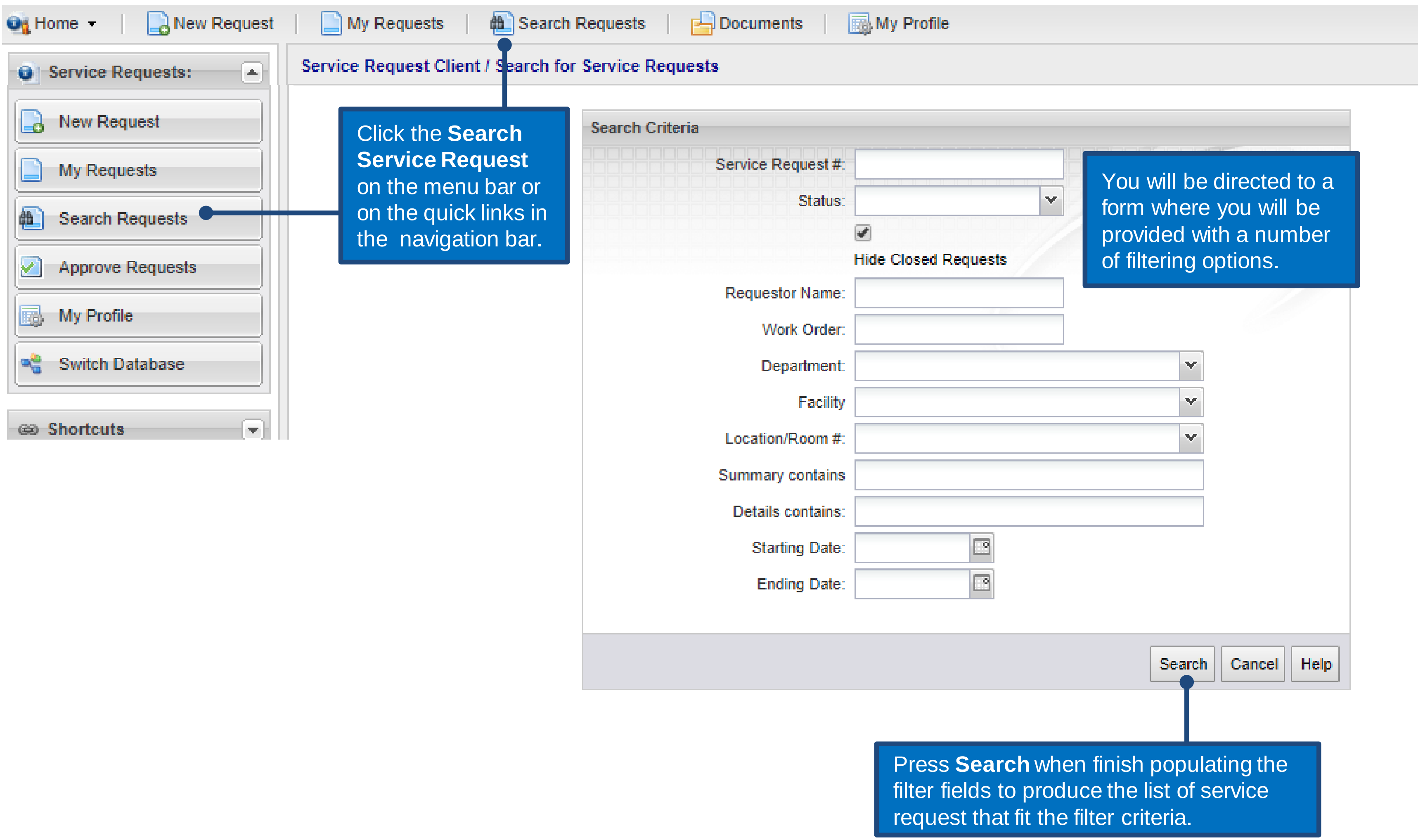
To complete the process, click **Submit** button and the request will be entered into the system.



Search Service Request Data

List/Search Service Request Data

Some facilities may have more than one requestor.



List/Search Service Request Data

You can sort this table by clicking on any one of the column header, such as Date.

Use the **Print** button when ready to print the list.

Service Request Client / Search for Service Requests

Print

Search Results

Pages: < 1 2 3 5 >

Select all | Unselect | Select between | Display all | Export | Customize

Request	Date	Status	Priority	Buildings	Summary	Service Provider	Requestor
SR001669	2017-10-03 16:21:26	New	Low	250 Davenport Road	Electrical - No Po		Mary Dollano
SR001668	2017-09-20 13:37:12	New	Low	250 Davenport Road	Ceilings - New Discoloration		Anita Wilson
SR001667	2017-09-19 15:37:12	New	Low	Community Centre	This is a test		a on
SR001666	2017-09-19 15:30:32	New	Low	Community Centre	need to pails of soap		a on
SR0			Low	City Hall - Site	VANDALISM - Interior		y Dollano
SR0			High	Recreation Centre	Ceilings - Water Stains		Anita Wilson
SR001661	2017-07-06 14:00:18	New	Low	Community Centre	Ceilings - Water Stains		Anita Wilson
			Low	250 Davenport Road	Air Quality - Odour Detected - Moldy, Mildew, Damp Smell		Steve Drew

Export will produce an excel version of the data.

The **Customize** button allows you to add or remove different columns of information to your table.

The first column contains **hyperlink** to take you to the detailed view of the request.

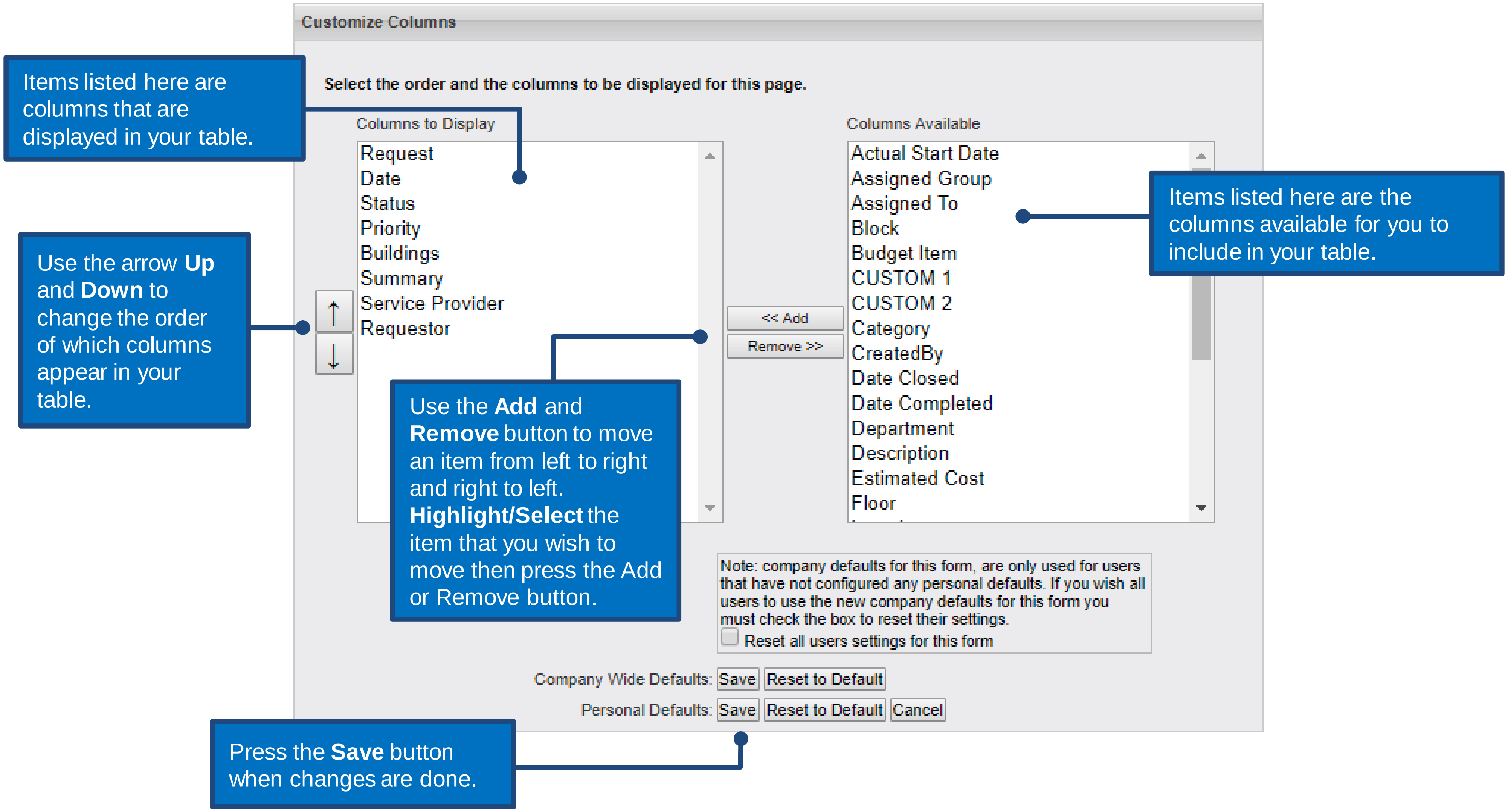
The icons shown beside each request can visually identify what are the current status of the requests:

New Status
Pending
Work in Progress
Closed
New Notes

***Note**: Status changes or addition of notes are generally followed up with an email notification to the requestor.*

List Service Request – Customize Columns

Customize Columns can be used to add or remove columns from your table.

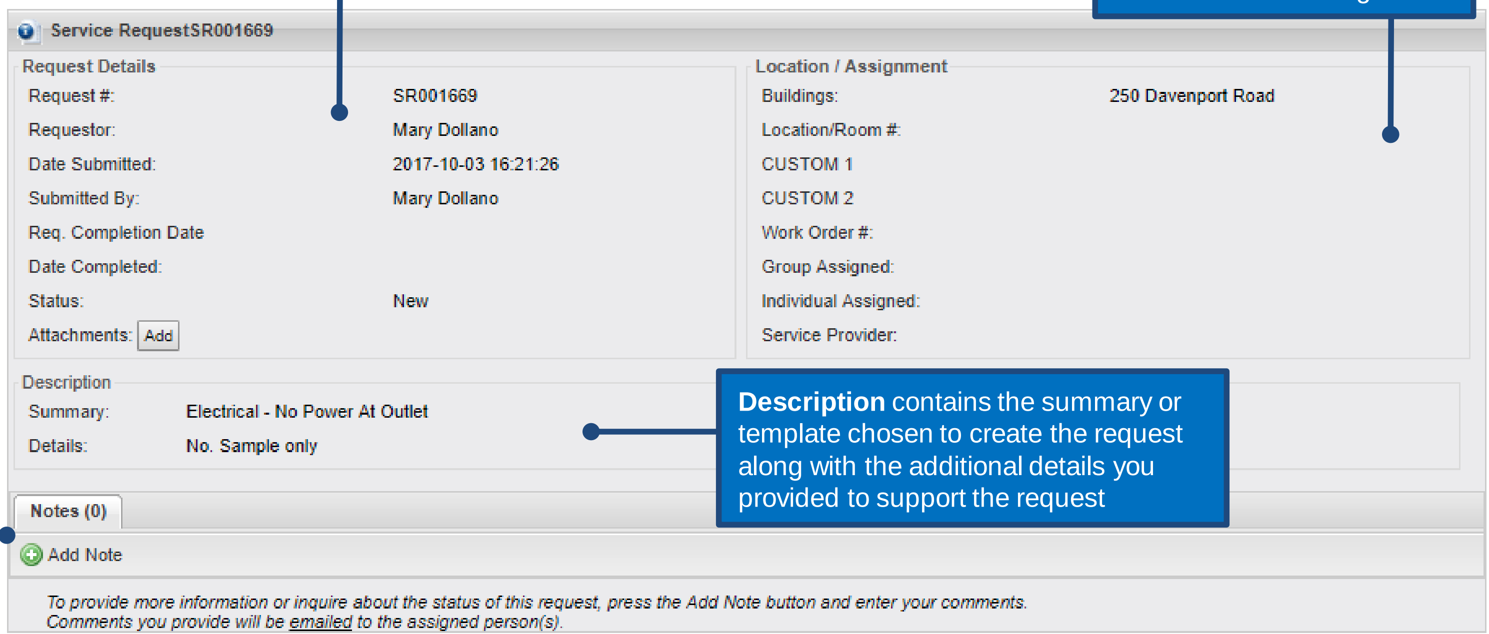


Service Request Page

To view the request in its detailed view, click on one of the active links show in blue. It is always the first column on the left (See slide 14).

Request Details contains all the general information relating to the request you entered as well as information that will be updated by the Support Team such as Status, Date Completed.

Location/Assignments states where the request for service is required and whom the SR is assigned to.



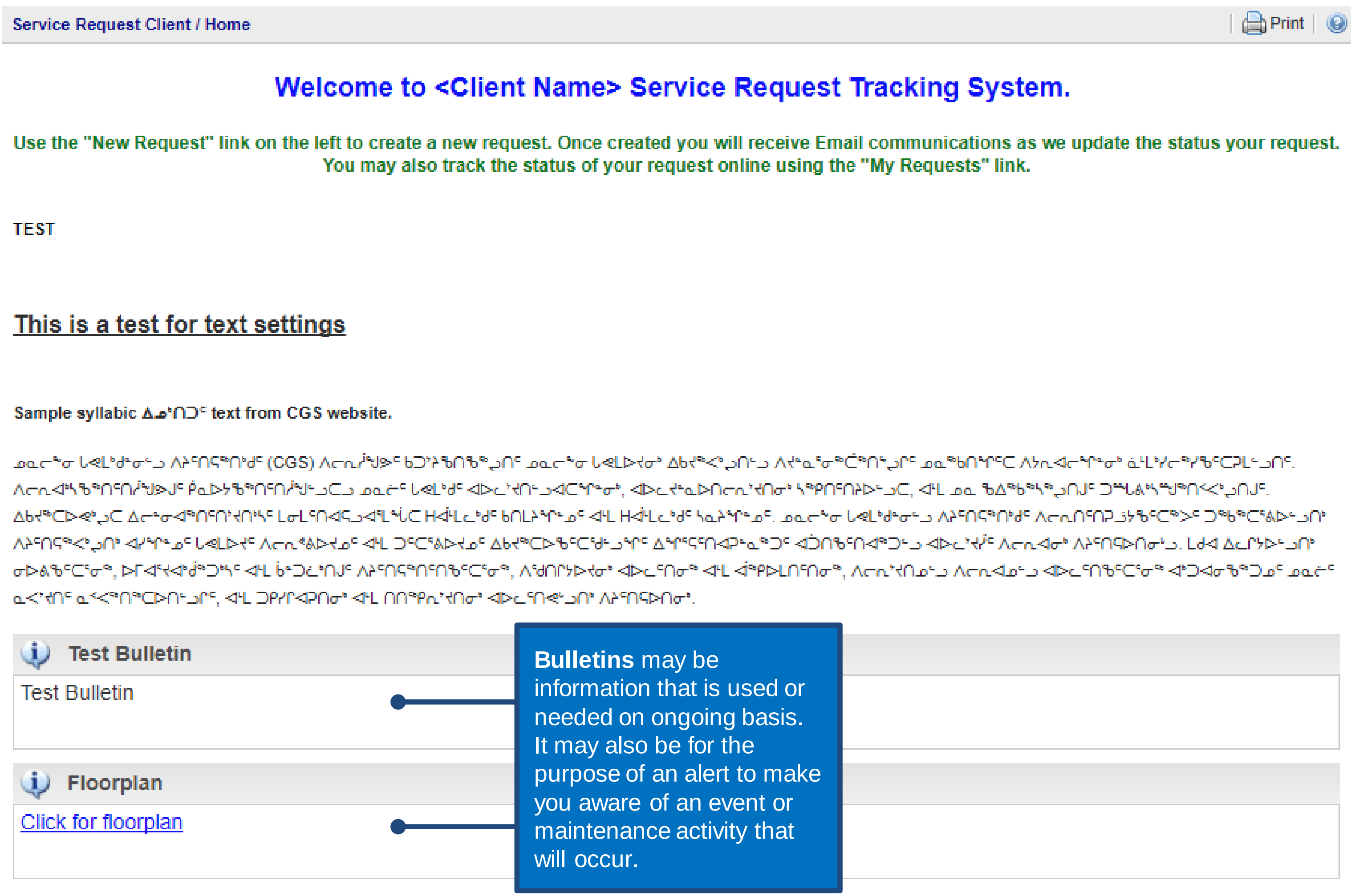
Description contains the summary or template chosen to create the request along with the additional details you provided to support the request

Lists any **Notes** or comments that have been added to the request or provides the option to add a note to the request.

Bulletins

Tips & Tricks

From time to time, your service request support team may display Bulletins. These will appear below the welcome message on your log in screen.



Bulletins may be information that is used or needed on ongoing basis. It may also be for the purpose of an alert to make you aware of an event or maintenance activity that will occur.