



AssetPlanner™

Quick Start Guide

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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**.

Asset Planner - Login

Please enter your Login Information:

User ID (Email):

Password:

Keep me logged in on this computer

[New User](#)

[I forgot my password](#)

GeoTrust[®] secured website

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.

Asset Planner - Login

Your password has expired. Please verify existing and provide new Password below.

User ID (Email):

Current Password:

New Password:

Verify Password:

[New User](#)

[I forgot my password](#)

GeoTrust[®] secured website

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

Navigation:

Homescreen Layout & Asset List

Home Screen Layout

The **Menu Bar** provides links to commonly used features such as Reports, Dashboard, Favorites and Preferences etc. In the SR Module tab you'll find links such as find and create request as well as create triggers and review the SR templates.

The **Navigator & Facility list panel** consist of: Module Selection, Facility Map & List, Quick Links, & History Items.

The **Service Request Status Chart** shows the number of request. Clicking on bar or piece of pie will edit the list of service request shown at the bottom of the page based on you selection.

The screenshot displays the 'Service Request Support / Service Request - Home' interface. It features a top navigation bar with tabs for Home, My Dashboard, Favorites, Service Requests, Bulletins, Assets, and Reports. A left sidebar contains a 'Modules' section with icons for various functions, an 'Asset Register' with 'Map' and 'List' options, and a 'Quick Links' section with links like 'Go to Request #', 'Tactical dashboard', 'My Requests', 'Find Requests', 'New Service Request', 'Help on SR Module', and 'Contact us'. Below this is a 'History' section with a list of recent requests and a 'Database Selection' section. The main content area is titled 'Service Request Support / Service Request - Home' and includes a 'Charts view' tab. It contains two charts: 'Requests Requiring Action' (a horizontal bar chart) and 'Open by Priority' (a horizontal bar chart). A pie chart on the right shows the status distribution: New (111), Pending (19), Work in Progress (28), and Super Urgent (4). Below the charts is a table of 'Service Requests' with columns for Request #, Summary, Date Created, Priority, Status, Attach..., Type, and Buildings. The table lists 13 requests, including SR001659 through SR001647. At the bottom of the page, there is a pagination control showing 'Page 1 of 2' and a status 'Displaying 1 - 750 of 1362'.

Request #	Summary	Date Created	Priority	Status	Attach...	Type	Buildings
SR001659	Ceilings - Water Stains	2017-06-12 08:22:44	Low	New		MM - Minor ...	Archive Facility
SR001657	Ceilings - Water Stains	2017-05-12 09:00:00	Low	New			Centennial Apartme...
SR001656	Ceilings - New Discoloration	2017-05-12 07:38:59	Low	Work in Pro...			Centennial Apartme...
SR001655	Ceilings - Water Stains	2017-05-03 10:39:04	Low	Closed			Champlain Place
SR001654	Custodial Service - Supplies Required	2017-04-26 15:23:53	Low	Closed		MM - Minor ...	Main School
SR001652	Ceilings - Water Stains	2017-04-21 10:24:21	Low	New			250 Davenport Road
SR001651	Doors - Exterior - Closing Hardware Broken	2017-04-13 15:08:32	Low	New			250 Davenport Road
SR001650	Ceilings - New Discoloration	2017-04-07 13:18:58	Urgent	Closed		MM - Minor ...	250 Davenport Road
SR001649	Ceilings - New Discoloration	2017-04-07 12:40:29	Urgent	Closed		MM - Minor ...	250 Davenport Road
SR001648	Ceilings - New Discoloration	2017-04-07 12:36:17	Low	Closed		MM - Minor ...	250 Davenport Road
SR001647	Electrical - Car Plug-in Does Not Work	2017-04-07 10:26:01	Low	New		MM - Minor ...	City Hall - Site

Note: There are two tabs at the bottom of the navigation panel.

Home Screen Layout

Clicking on **Home** will take you back to the main dashboard. This can also be done by clicking on any of the **Module icons**.

My Dashboard allows you to design a customized home screen layout.

The **Tool Box** contains many useful links including **Shared Documents** folder.

Bookmark any page in AssetPlanner™ as a **Favorite** for quick and easy access.

Print the content of any page from the software.

Help buttons (blue question marks) are located throughout the program. Clicking on them will provide with information specific to the page you are viewing.

The **Arrow Buttons** show or hide tabs to maximize the amount of content you view 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.

The screenshot displays the AssetPlanner™ interface. At the top, a menu bar includes 'Home', 'My Dashboard', 'Favorites', 'Service Requests', 'Bulletins', 'Assets', 'Reports', 'Tool Box', 'Configure', and 'Preferences'. On the left, a 'Modules' section shows icons for different functional areas. Below this is an 'Asset Register' with 'Map' and 'List' options, a 'Messages' box with a 'New AssetPlanner™ Support Phone Number' notification, and 'Quick Links' for navigating to various request-related pages. A 'History' section lists recent tasks and assets. The main content area features two charts: 'Requests Requiring Action' (a horizontal bar chart showing counts for 'Assigned to you', 'Assigned to your Groups', 'Updated in past 7 days', 'Overdue', and 'Pending Approval') and 'Open by Priority' (a vertical bar chart showing counts for 'Low', 'Medium', 'High', 'Urgent', and 'Super Urgent'). Below the charts is a 'Service Requests' table with columns for 'Request #', 'Summary', and 'Status'. A table on the right shows a list of requests with columns for 'Type' and 'Buildings'. A 'Tool Box' menu is open, listing 'Asset Planning', 'Project Planning', 'Preventative Maintenance', 'Energy & Sustainability', 'Service Request Support', 'Service Request Client', and 'Logout'. A 'Print Requests' dialog box is also visible. At the bottom, a pagination control shows 'Page 1 of 2'.

User Preferences

Tabs across the top allow you to customize **Module Specific** Preferences.

The **Paginate Listing** determines how many records should be displayed in a table before the table is split up into multiple pages.

Set the **Notes Display Order** to show most recent notes at the top or end of the notes list.

Set the **Print Action Button** to *Print* which will launch the print dialog with one click or *Open the Print View* first then press print on the new window.

Number of History Items to Keep sets the number of history items saved & displayed on the **Navigation Panel**.

Select the **Color Theme** on your AssetPlanner™ page according to the your preference.

Preferences are user based settings that are remembered each time you use AssetPlanner™.

Ensure to click **Save** when changes has been made to the preferences page.

Use this button to **Change your Password**.

**Note: Some changes require a browser refresh to take affect.*

The screenshot shows the 'Preferences' window in AssetPlanner. At the top, there are tabs for 'General', 'Projects', 'PM', and 'Service Requests'. A dropdown menu is open for 'Preferences', showing options for 'General', 'Projects', 'PM', and 'SR'. The 'General' tab is selected. The settings are as follows:

- Paginate Listings: 750
- Notes Display Order: Display Most Recent Note Last
- Print button action: Open Print view
- Page Break between Sections on Reports: No
- Default Fiscal Year Selection: Yes
- Remember last Cost Item entered: Yes
- Number of History Items to keep: 20
- Color Theme: Gray

At the bottom of the window, there are four buttons: 'Save', 'Change Password', 'Logout', and 'Help'.

User Preferences

Preferences

General Projects PM Service Requests

Receive Service Request Email Notifications: Yes

Default type of Requests to show on Home Page: All Requests

Default Report style to use when Printing from SR Home page or SR Listings: Detailed Report. (1 SR per page)

When Printing Include:

- Requestor Tab
- Cost Details Tab
- Activity Tab

Custom SR Notifications

+ New | ✎ Modify | - Delete

When	Type	Buildings	Region	Sector	Assigned Group	Priority
No notifications have been created. Press New button to create one.						

Save Change Password Logout Help

Keep it 'Yes' if you wish to receive email notifications of the SRs that are assigned to you. If you frequently visits the database, you may turn it off by selecting 'No'.

Set the home page view of the SR Module to meet your daily needs of information to be displayed.

Set the style of SR Report according to preference when printing from SR home page or listing.

Determine when to notify the user based on the rules created in the custom SR notification.

***Note:** Always click **Save** when changes has been made before leaving the page.

Site Map / Site List Table

Display your building/site on a **Map** based on their address information.

Displays detailed building/site information for multiple sites at the same time. Select an option from the **List** menu so it knows which list you wish to view.

Filter, export or search this table using key words.

Selecting the **Down Arrow** beside a column label will sort the table, add or remove columns or group your sites based on any of the columns in the List table.

The screenshot displays a software interface with two main views: a map and a list table. The top view is titled 'Element Map' and shows a geographical map of the region around Regina and Winnipeg, Saskatchewan, with a red pin indicating a location. The bottom view is titled 'Buildings List' and shows a table of building data. The interface includes a menu bar with options like 'Service Requests', 'Assets', 'Reports', and 'Tool Box'. A 'List' menu is open, showing various categories like 'All Buildings', 'Facility', 'Unit', 'Building', 'Site', and 'Roads'. A search bar and an 'Export' button are visible above the table.

Buildings	Address	City	Department	Buildings Size	Buildings Measure Unit	Site Size	Site Measure Unit	Uni
01 All Townhouses		Windsor			Sq.M.		Sq.M.	
250 Davenport Road		chicago	Community Init...	9,146	Sq.M.	0.00	Sq.M.	
250 Davenport Road - Site						0.00	Sq.M.	
445 Glengarry						0.00	Sq.M.	
5402-5404 Reginald St.						0.00	Sq.M.	
5405-5417 Reginald St.						0.00	Sq.M.	
5405-5417 Reginald St. - Unit - 540							Sq.M.	
5405-5417 Reginald St. - Unit - 540							Sq.M.	
5405-5417 Reginald St. - Unit - 540							Sq.M.	
5406-5418 Reginald St.	5406-5418 ...	Windsor	City of Windso...	7,448	Sq.M.	0.00	Sq.M.	
5421-5423 Reginald St.	5421-5423 ...	Windsor	City of Windso...	4,256	Sq.M.	0.00	Sq.M.	
5425-5427 Reginald St.	5425-5427 ...	Windsor	City of Windso...	3,200	Sq.M.	0.00	Sq.M.	
5428 Reginald St.	5428 Regin...	Windsor	City of Windso...	3,200	Sq.M.	0.00	Sq.M.	
5429-5431 Reginald St.	5429-5431 ...	Windsor	City of Windso...	5,600	Sq.M.	0.00	Sq.M.	
5430-5438 Reginald St.	5430-5438 ...	Windsor	City of Windso...	7,448	Sq.M.	0.00	Sq.M.	
5433-5435 Reginald St.	5433-5435 ...	Windsor	City of Windso...	5,600	Sq.M.	0.00	Sq.M.	
5437 Reginald St.	5437 Regin...	Windsor	City of Windso...	3,192	Sq.M.	0.00	Sq.M.	
5439-5441 Reginald St.	5439-5441 ...	Windsor	City of Windso...	5,320	Sq.M.	0.00	Sq.M.	

Site List

The screenshot displays a software interface with a navigation pane on the left and a main content area on the right. The navigation pane shows a tree structure of assets, with '250 Davenport Road' selected. The main content area shows a form for '250 Davenport Road' with various fields and tabs.

Service Request Support / 250 Davenport Road

250 Davenport Road

Save Back New Delete Help

General Details Condition Summary Unit Cor

Buildings: * 250 Davenport Road
Description: 4 story building
District No:
Function:
Sector: * Housing
Region: Housing C
Development: 250 Davenport Road
Department: Community
Facility Code:
Unique Building ID:
Floor List: 1,2,3,4
Optional con Request Mo
Address: Canada
City: United Sta
Country: United Sta

Navigation Buildings

Select a different grouping structure by using the **View** drop-down.

Click the '+' sign to expand a grouping and see which facilities are part of a grouping.

The Building also has '+' sign similar to the grouping. Expanding it will show what information is related to the specific building as well as which module has data relating to it. Selecting of the items will automatically switch you to the module and produce the list of details.

Select a **Building** by clicking on the Building/Site name. Double-click to open the facility form.

When **Building** tab is selected at the bottom right of the navigator tab, the panel will display site portfolio using the default grouping structure.

*Note: Groupings are displayed as **folder** icons, while sites have a **building** icon.*

Site Details

Details tab is where more information about the building/site can be added.

An area to store pictures, word, pdf., excel documents or CAD drawings that relate to the building/site.

Displays where the Building/Site is located.

These fields are used to group sites in the Building/Site tree, when filtering meters/meter data and in the reports

The Address information is used to determine where each Building/Site will be located on the map.

250 Davenport Road

Save Back New Delete Help

General Details Condition Summary Unit Contact Custom Details Building Details History Notes Tasks (1) Attachments Funding FCI Map Activity

Buildings: * 250 Davenport Road

Description: 4 story building. Brick.

District No: [dropdown]

Function: [dropdown]

Sector: * Housing [dropdown]

Region: Housing Connections [dropdown]

Development: 250 Davenport Road [dropdown]

Department: Community Initiatives [dropdown]

Facility Code: [input]

Unique Building ID: [input]

Floor List: 1,2,3,4

Optional comma separated list of floor names. (Used by Service Request Module).

Address: 250 Davenport Rd

City: Toronto [input]

Country: Canada [dropdown]

Province/State: Ontario [dropdown]

Postal/Zip: M5R 1J8 [input]

Status: Active [dropdown]

Buildings consists of

- 56 Element(s)
- 3 Audits(s)
- 13 Project(s)
- 38 Asset(s)
- 1 Meter(s)
- 28 Service Request(s)

AP Standard Classifications

Level1: [dropdown]

Level2: [dropdown]

Level3: [dropdown]

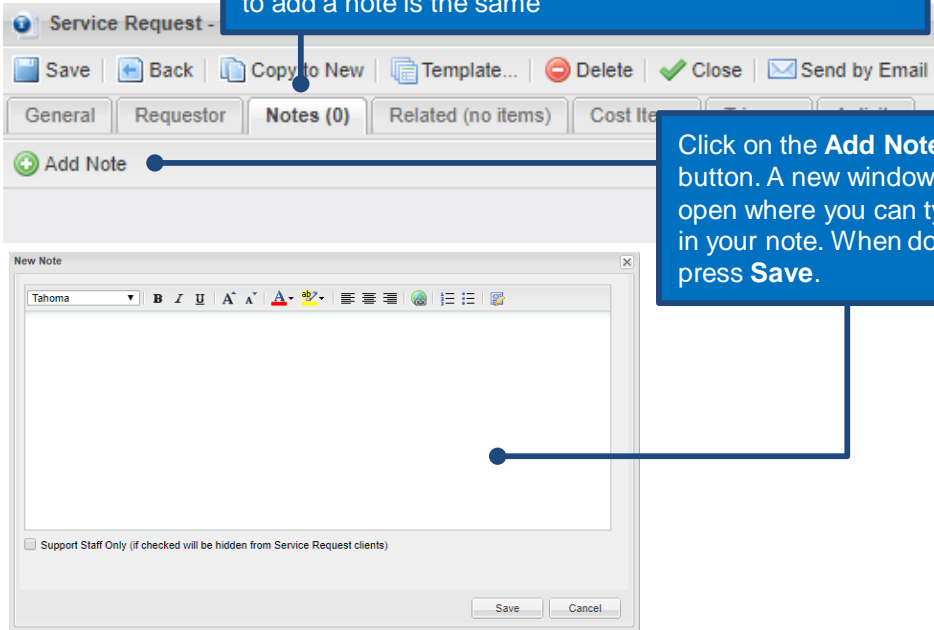
Level4: [dropdown]

Frequent Actions

Frequent Actions

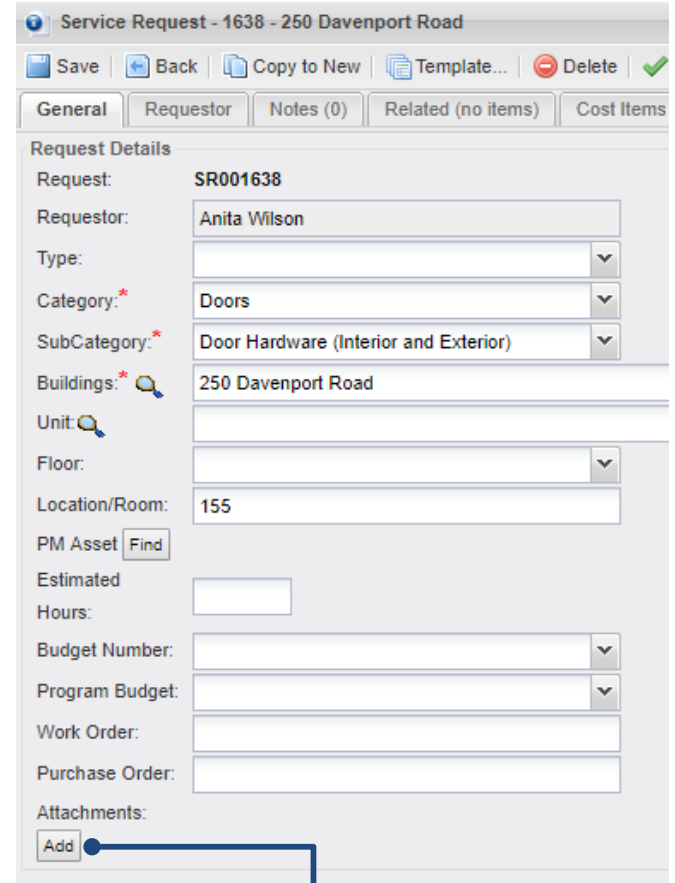
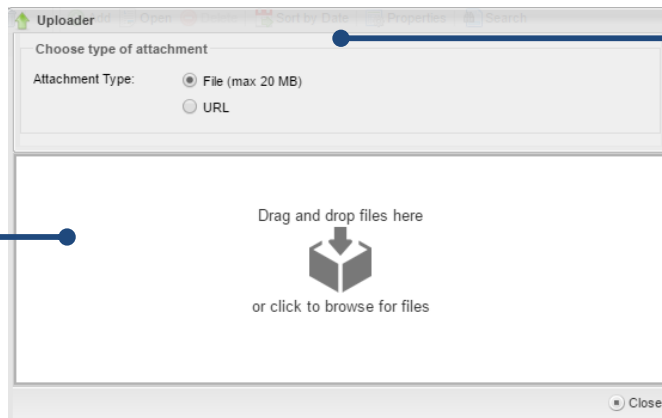
There are a couple of frequent actions or activities that one will perform in AssetPlanner™

Wherever you see **notes** tab in the software, the action to add a note is the same



Click on the **Add Note** button. A new window will open where you can type in your note. When done, press **Save**.

Drag and drop it into this area shown in the AssetPlanner™.



Use the **Add** button to attached any picture, file or any documents that is related to the request. **Uploader** window will open once you click this button.

Service Request

List Service Requests

The list of service requests shown on the homepage will be displayed based on your Preference default settings. In the event you need to change this setting, various options are in place in addition to the interactive charts shown.

Service Request Support / Service Request - Home Add Favorite | Print | Help

Charts view | Calendar

Requests Requiring Action
Assigned to you
Assigned to your Groups
Updated in past 7 days

Open by Priority
Low 115

Open by Status
111
Pending, 19
Work in Progress, 28

Use this **Show** dropdown to display the requests you prefer to show in the homepage.

Additional tools are in place at the top of the displayed list such as **Filters, Assign, Close Request, Modify, Print, and Export**. A Search field is also in place to assist at finding a specific SR.

Service Requests

Show: All Requests | Filters | Assign... | Close Requests | Modify Selected | Print Requests | Export | Search

Request #	Summary	Date Created	Priority	Status	Attach...	Type	Buildings	WorkOrder	Date Completed
Approver Role: null									
SR001659	Ceilings - Wa	2017-05-27	Low	New Status					
SR001657	Ceilings - Wa	2017-05-27	Low	Pending					
SR001656	Ceilings - Ne	2017-05-27	Low	Work in Progress					
SR001655	Ceilings - Wa	2017-05-27	Low	Closed					
SR001654	Custodial Se	2017-05-27	Low	Closed					
SR001652	Ceilings - Wa	2017-05-27	Low	New Status					
SR001651	Doors - Exterior - Closing hardware broken	2017-05-27	Low	New Status					
SR001650	Ceilings - New Discoloration	2017-05-27	Low	Closed					

A filter window will open and allow to pick and choose the criteria you wish to filter the list by.

You can visually identify what status the requests are currently in by the icon beside the SR number.

Click on any column heading to have the information sorted by alpha or numeric order.

Filters
Service Request #:
Summary contains:
Priority:
Assigned Group:
Assigned To:
Service Provider:
Status:
Pending:
Date Field: Created
Date Range: Range...
Starting Date:
Ending Date:
Fiscal Year:
Type:
Sector:
Region:
Department:
Development:
Asset Class:

Centennial Apartme...
Champlain Place
MM - Minor ... Main School
250 Davenport Road
250 Davenport Road
MM - Minor ... 250 Davenport Road
MM - Minor ... 250 Davenport Road
MM - Minor ... 250 Davenport Road
MM - Minor ... City Hall - Site
MM - Minor ... City Hall - Site 501

Displaying 1 - 750 of 1362

Page 1 of 2

Legend:
! - New Status ⏸ - Pending
🚧 - Work in Progress ✅ - Closed
📄 - Notes

Tip: To modify multiple SRs, hold **CTRL** key on the keyboard and select the SRs you wish to make the changes.

Service Request Page

A couple of ways to create a new service request in the Support View:

The screenshot displays the 'Service Request' page in a web application. The interface includes a top navigation bar with 'Home', 'My Dashboard', 'Favorites', and 'Service Requests' menus. A 'Tool Box' is visible on the right. On the left, there is a 'Modules' section with icons for various functions, an 'Asset Register' with 'Map' and 'List' options, and a 'Quick Links' section. The 'Quick Links' section contains several options, with 'New Service Request' highlighted by a blue callout box. The main content area shows a 'Service Request Summary' with 'Charts view' and 'Ca' tabs. Below this, there are sections for 'Assigned', 'Assigned to your', 'Updated in past', 'Over', and 'Pending Ap'. A 'Service Requests' table is visible at the bottom, with a 'Show: All Requests' dropdown and buttons for 'Filters', 'Assign...', 'Close Requests', and 'Modify Selected'. A bar chart titled 'Open by Priority' is also present, showing the number of requests for each priority level: Low (115), Medium (19), High (13), Urgent (7), and Super Urgent (4). A blue callout box points to the 'New Request' option in the 'Service Requests' menu, indicating that selecting it will open a new SR page for recording the request.

Priority	Count
Low	115
Medium	19
High	13
Urgent	7
Super Urgent	4

Click **New Service Request** option under the Quick Links shown in the Navigator bar. A new SR page will open where you can record the request.

Select the **New Request** under the Service Requests menu list. A new SR page will open where you can record the request.

Service Request Page

Upon starting a new request, the database will start the request by directing you to the requestor tab.

New Service Request

Save Back Copy to New Template... Delete Help

General Requestor Notes Related Cost Items Triggers

Find Existing Client Add/Modify Client Clear

Name: * Mary Dollano Phone:

Email: mdollano@ameresco.com Mobile Phone:

CC Email(s): VIP:

Department: Ameresco

Office:

Previous Tickets (Show)

Confirm the information in the **Requestor's** tab. It will populate the name and email based on the log-in information used to access the database.

Press **Save** to complete the entry

General tab contains all the general information relating to the request.

New Service Request

Save Back Copy to New Template... Delete Help

General Requestor Notes Related Cost Items Triggers

Request Details

Request:

Requestor: Mary Dollano

Type: MM - Minor Maintenance

Category: * IT

SubCategory: * Computers and Computer Cabling

Buildings: *

Unit:

Floor:

Location/Room:

PM Asset Find

Estimated Hours:

Budget Number:

Request Status

Status: * New

Clicking on the **Template** button produces a list of template or ready built service request types to choose from. Selecting a template will auto fill a number of other fields in the **General** tab.

Select Template

Select a template that will set the values for this service request. Summary, Category, SubCategory and other items specified in the template will overwrite any current values in those fields.

Buildings	Category	SubCategory	Type	Audience	Summary
	Air Quality	Odours, Smoke or ...		All	Air Quality - Odour Detected - BURNING
	Air Quality	Odours, Smoke or ...		All	Air Quality - Odour Detected - Moldy, Mild
	Air Quality	Odours, Smoke or ...		All	Air Quality - Odour Detected - NATURAL
	Air Quality	Odours, Smoke or ...		All	Air Quality - Odour Detected - SEWER G
	Air Quality	Odours, Smoke or ...		All	Air Quality - Odour Detected - STRONG L
	Air Quality	Ventilation, Exhaust...		All	Air Quality - Ventilation - Too Drafty
	Air Quality	Ventilation, Exhaust...		All	Air Quality - Ventilation - Too Stuffy
	Ceilings	Other Ceiling Issues		All	Ceilings - New Discoloration
	Ceilings	Gyprock, Painted		All	Ceilings - Paint Peeling, Flaking, Droppin
	Ceilings	Tiles - All Types		All	Ceilings - Tiles Loose, Broken or Missing
	Ceilings	Other Ceiling Issues		All	Ceilings - Water Stains
	IT	Computers and Co...		All	Communications - Computers Cannot Coi
	Electrical	PA/Paging System		All	Communications - Room Paging Speaker
	Electrical	Telephone System		All	Communications - Room Telephone Has I
	Electrical	Telephone System		All	Communications - Room Telephone Has I
	Electrical	TV/Video System		All	Communications - TV Monitor Cannot Coi
	Custodial	Exterior Cleaning, C		All	Custodial Service - Clean In Required - E

Select Close

Note: Although it is a good practice to pick from the templates, the compulsory fields can be filled out manually as required.

Service Request Page

In summary, the service request page can be broken out into three sections:

The screenshot shows a web application window titled "New Service Request". It features a menu bar with "Save", "Back", "Copy to New", "Template...", "Delete", and "Help". Below the menu are tabs for "General", "Requestor", "Notes", "Related", "Cost Items", and "Triggers".

The form is divided into several sections:

- Request Details:** Includes fields for Requestor (Mary Dollano), Type (MM - Minor Maintenance), Category (IT), SubCategory (Computers and Computer Cabling), Buildings, Unit, Floor, Location/Room, PM Asset (Find), Estimated Hours, Budget Number, Program Budget, Work Order, Purchase Order, and Attachments.
- Request Status:** Includes fields for Status (New), Pending, Priority (Low), Escalated, Created, Last Modified, Scheduled Date, Actual Start Date, Req. Completion Date, Date Completed, Date Closed, Assigned Group, Assigned To, Service Provider, CUSTOM 1, and CUSTOM 2.
- Summary:** A text area containing the text "Communications - Computers Cannot Connect To LAN or Internet".
- Description:** A large text area for expanding on the details of the request.

Three callout boxes provide additional information:

- Request Details area:** includes the SR number, the requestor name, categories, type of request based on the SR category company settings, the Site and specific site location information. Asset or attachments linked to the Service Request will also have active links shown here.
- Request Status area:** contains the current status of the request, priority level, important dates relating to the progress of the SR as well as assigned groups, individuals or contracted Service Providers. Custom fields may also be added here.
- The Summary:** shows the template selected by the requestor and **Description** provides room to expand on the details provided about the request.

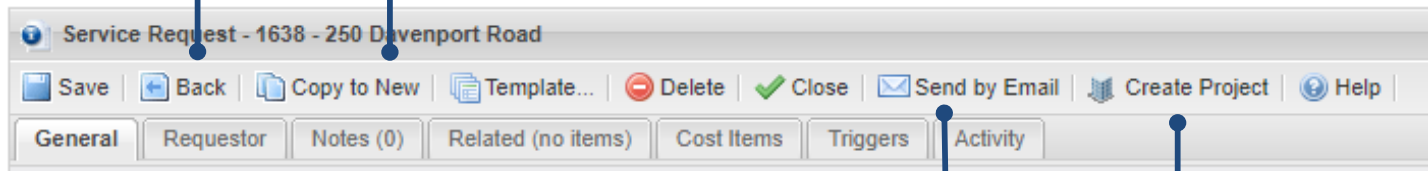
Service Request Page

The Service Request page has various functional buttons or options at the top of the request.

Always press **Save** every time changes are made.

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

Copy to New duplicates the SR you are presently viewing and allows you to edit necessary fields in order to meet the requirements of the new SR.



Send by Email provides the option to send all the information displayed on the general screen to someone who doesn't have access to the database. Enter the email address and message in the **Send a copy by Email** window.

You can **Create a Project** from the SR module. Once you click this button, New Project page will open and automatically switch from SR module to the Project module.

A screenshot of a dialog box titled "Send a copy by Email". The dialog box has a "Pending" status indicator in the top right corner. The main text inside the dialog box says "Enter the email address and an optional CC address and any comments you wish to attach." Below this text are three input fields: "To: *" with a dropdown menu containing "Enter email or search from address book", "Cc:" with a dropdown menu, and "Comments:" with a large text area. At the bottom of the dialog box are "Submit" and "Cancel" buttons.

Service Request Page

Add Reminder

Enter the email address and an optional CC address and the Date Time you wish the reminder to be sent.

Send an Email Reminder To:

Cc:

Reminder Date/Time:

List any **notes** or comments that have been added to the request or provides the option to add a note to the request. See page 14.

Create a custom **Trigger** or reminder for any request that is scheduled for a future date. Any company set triggers will also be listed here.

Activity tab lists all the changes and notifications relating to the request and who was involved in the activity.

New Final Cost Item

Cost Detail

Date:

Component:

Cost Type:

Part used:

Provider:

Code:

Base Rate/Cost:

Units:

Quantity:

Cost:

GST2:

GST 2:

Total:

Comments

Cost Item ID: 1638.0
Created by: Mary Dolano
on:
Modified by:
on:

Save Delete Close

Cost Details may also be recorded by clicking on the **Add** button and a cost details screen will open. Information such as provider, labour hours, material costs or attach documents specific to the cost source may be added.

Request - 1638 - 250 Davenport Road

Save Back Copy to New Template... Delete Close Send by Email Create Project Help

General Requestor Notes (0) Related (no items) Cost Items Triggers Activity

Related tab provides the option to or contains the list of SR's that have been related or connected to the service request. Also, it will display or give option to relate projects from the Project module.

General cost information may be recorded in the **Cost Items** tabs.

Search for Service Requests to Relate

Search criteria

Request: Buildings:

Created Since: Location:

Category: Assigned To:

SubCategory: Provider:

Summary:

Search Results. Double click or Select one or more Requests press Select button.

Request	Date	Status	Buildings	Summary
SR001660	2017-06-13...	Pending	250 Davenport Road	Air Quality - Odour Det
SR001659	2017-06-12...	New	Archive Facility	Ceilings - Water Stains
SR001658	2017-05-25...	Pending	250 Davenport Road	Air Quality - Odour Det
SR001657	2017-05-12...	New	Centennial Apartments	Ceilings - Water Stains
SR001656	2017-05-12...	Work in Pro...	Centennial Apartments	Ceilings - New Discolor
SR001655	2017-05-03...	Closed	Champlain Place	Ceilings - Water Stains
SR001654	2017-04-26...	Closed	Main School	Custodial Service - Supplies Required
SR001652	2017-04-21...	New	250 Davenport Road	Ceilings - Water Stains
SR001651	2017-04-13...	New	250 Davenport Road	Doors - Exterior - Closing Hardware Broken
SR001650	2017-04-07...	Closed	250 Davenport Road	Ceilings - New Discoloration
SR001649	2017-04-07...	Closed	250 Davenport Road	Ceilings - New Discoloration
SR001648	2017-04-07...	Closed	250 Davenport Road	Ceilings - New Discoloration

Page 1 of 67 | Show/Hide Details | Displaying Items 1 - 25 of 1658

Select Cancel

Service Request - 1638 - 250 Davenport Road

Save Back Copy to New Template... Delete Close Send by Email Create Project Help

General Requestor Notes (0) Related (no items) Cost Items Triggers Activity

Cost Summary

Estimated Time: Labour Rate (hr):

Estimated Cost: Materials Cost:

Labour Cost: GST2:

Service Provider Cost:

Labour Hours:

Other Cost:

GST 2:

Total Cost:

Add Create items from existing costs Note: When using cost items the Service Request's Cost is derived from these items.

Date	Attachm...	Type	Provider	Code	Rate	Units	Qua...	Cost	GST2
------	------------	------	----------	------	------	-------	--------	------	------

Closing a Service Request

Completing a Service Request

Service Request can be closed from the Home Page.

Service Request Support / Service Request - Home

Charts view | Calendar

Requests Requiring Action

Open by Priority

Open by Status

Assigned to you
Assigned to your Groups
Updated in past 7 days
Overdue
Pending Approval

Low 116
Medium 19

New, 111
Recently Closed, 1
Pending, 19

Click the **Close Requests** when all SRs that you wish to close are selected. All SRs will be stamped with the current date.

You may also close the SRs using the **Modify Selected**. You must select at least two SRs to use this feature.

After selecting the SRs, a new window will open where you can enter all the necessary data and press select Closed from the Status dropdown.

Show: All Requests

Filters Assign... Close Requests Modify Selected Print Requests Export

Request #	Summary	Date Created	Priority	Status	Attach...	Type	Buildings
SR001662	Ceilings - Water Stains	2017-08-15 09:29:53	High	New		MM - Minor ...	Recreation
SR001661	Ceilings - Water Stains	2017-07-06 14:00:18	Low	New			Community Centre
SR001659	Ceilings - Water Stains	2017-06-12 08:22:44	Low	Work			
SR001657	Ceilings - Water Stains	2017-05-12 09:00:00	Low	Work			
SR001656	Ceilings - New Discoloration	2017-05-12 07:38:59	Low	Work			
SR001655	Ceilings - Water Stains	2017-05-03 10:39:04	Low	Close			
SR001654	Custodi	2017-05-03 10:39:04	Low	Close			
SR001652	Ceilings	2017-04-07 12:40:29	Low	New			
SR001651	Doors -	2017-04-07 12:40:29	Low	New			
SR001650	Ceilings	2017-04-07 12:40:29	Urgent	Close			
SR001649	Ceilings - New Discoloration	2017-04-07 12:40:29	Urgent	Close			
SR001648	Ceilings - New Discoloration	2017-04-07 12:36:17	Low	Close			

Approver Role: null

Select the Service Request that you wish to close. Hold the **Ctrl** to select multiple SRs.

You are about to modify 3 Service Requests. Set only the field(s) you wish changed in each Request.

Service Request (Modify multiple)

Save Back Copy to New Template... Delete Help

General Requestor Notes Cost Items Triggers

Request Details

Request: Requestor: Type: Category: SubCategory: Buildings: Unit: Floor: Location/Room: PM Asset Find Estimated Hours: Budget Number: Program Budget: Work Order: Purchase Order: Attachments:

Request Status

Status: Pending: Priority: Escalated: Created: Last Modified: Scheduled Date: Actual Start Date: Req. Completion Date: Date Completed: Date Closed: Assigned Group: Assigned To: Service Provider: CUSTOM 1: CUSTOM 2:

Summary*

Completing a Service Request

Using **Close** from the menu will automatically close the Service Request and will be stamped with the current date. This is convenient if you are closing an SR on the same day the work has been completed. *Clicking the Save button is not required.*

A few status options can be selected from the **Status** field – **New** (default after SR is created), **Work in Progress**, **Closed**, **Pending**, and **Denied**.

Click **Save** after entering all the necessary data.

You may enter the actual date of when the SR was completed using the calendar icon or manually enter the date in the **Date Completed** field .

Service Request - 1662 - Recreation Centre

Save Back Copy to New Template... Delete Close Send by Email Create Project (1364 items) Help

General Requestor Notes (0) Related (no items) Cost Items Triggers Activity

Requester: Anita Wilson

Category: MM - Minor Maintenance

SubCategory: Ceilings

Buildings: Recreation Centre

Unit:

Floor:

Location/Room:

PM Asset Find

Estimated Hours:

Budget Number:

Program Budget:

Work Order:

Purchase Order:

Attachments: Add

Request Status

Status: New

Pending:

Priority:

Escalated:

Created:

Last Modified:

Scheduled Date:

Actual Start Date:

Req. Completion Date:

Date Completed:

Date Closed:

Assigned Group: Test Group

Assigned To:

Service Provider:

CUSTOM 1:

CUSTOM 2:

Summary: Ceilings - Water Stains

THIS IS A TEST

Description:

Search Service Request Data

List/Search Service Request Data

To list/search for service requests, select **Service Requests** from the Menu bar and then select **Find Requests** or simply click the **Find Requests** on the quick links shown in the navigator bar.

The screenshot displays the 'Service Requests' module interface. The top navigation bar includes 'Home', 'My Dashboard', 'Favorites', 'Service Requests', 'Bulletins', 'Assets', 'Reports', and 'Tool Box'. The left sidebar contains 'Modules', 'Asset Register', and 'Quick Links'. The 'Quick Links' section includes 'Go to Request #', 'Tactical dashboard', 'My Requests', 'Find Requests', 'New Service Request', 'Help on SR Module', and 'Contact us'. The 'Service Requests' menu is open, showing options like 'Go to Service Request #', 'Tactical Dashboard', 'My Requests', 'Find Requests', 'New Request', 'Parts', 'Escalation Triggers', and 'Templates'. The 'Find Service Requests' form is open, featuring three tabs: 'Filters', 'More Filters', and 'Custom Details'. The 'Filters' tab is active, showing various search criteria such as 'Service Request #', 'Summary contains', 'Priority', 'Assigned Group', 'Assigned To', 'Service Provider', 'Status', 'Pending', 'Date Field', 'Date Range', 'Starting Date', 'Ending Date', 'Fiscal Year', 'Type', 'Sector', 'Region', 'Department', 'Development', 'Asset Class', 'Buildings Function', and 'Buildings'. The 'Find' button is located at the bottom right of the form.

You will be directed to a form where you will be provided with a number of filtering options distributed between three tabs – **Filters**, **More Filters**, and **Custom Details**.

When finished populating the filter fields required, click the **Find** button at the bottom to produce the list of service requests that fit the filter criteria.

List/Search Service Request Data

We have now generated a list of service requests that can be saved as favourite, exported to excel or printed.

Columns can be **sorted** by clicking on any one of the column headers.

The provided **Select** buttons allows the option to modify multiple or print the selected requests.

Use the **export** button to export the data in excel.

Move to the next pages to view the rest of the SRs or simple click the **Display all** to show all SRs in one page.

Request	Date	Status	Location	Requestor Name	Summary	Assigned To
SR001660	2017-06-12 23:13	Pending		Steve Drew	Air Quality - Odour Detected - Moldy, Mildew, Damp Smell	FAME-AP Service Contractor
SR001659	2017-06-12 08:22	New		Anita Wilson	Ceilings - Water Stains	Steve Drew
SR001658	2017-05-25 14:30	Pending		Anita Wilson	Air Quality - Odour Detected - NATURAL GAS	
SR001657	2017-05-12 09:00	New		Anita Wilson	Ceilings - Water Stains	
SR001656	2017-05-12 07:38	Work in Progress		Needa Wilson	Ceilings - New Discoloration	
SR001655	2017-05-03 10:39	Closed		Anita Wilson	Ceilings - Water Stains	
SR001654	2017-04-26 15:23	Closed		Anita Wilson	Custodial Service - Supplies Required	Jeff Lipkewich (yahoo)
SR001652	2017-04-21 10:24	New		Anita Wilson	Ceilings - Water Stains	Steve Drew

The first columns contains **hyperlinks** to take you to the detailed view of the request.

Click **Print Selected** button after selecting the requests that you wish to print.

Click **Modify** button after selecting the requests that you wish to make changes.

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

List of Service Requests – Customize Columns

Customize Columns

Select the order and the columns to be displayed for this page.

Columns to Display

- Request
- Date
- Status
- Location
- Requestor Name
- Summary
- Assigned To

Columns Available

- Actual Start Date
- Approver Role
- Assessed By
- Assessment Note
- Assessment Status
- Assessment Type
- Assessment Year
- Asset Name
- AssetID
- Assigned Group
- Attachment
- Budget Item

<< Add

Remove >>

Note: company defaults for this form, are only used for users that have not configured any personal defaults. If you wish all users to use the new company defaults for this form you must check the box to reset their settings.

Reset all users settings for this form

Company Wide Defaults: Save Reset to Default

Personal Defaults: Save Reset to Default Cancel

Select the heading from the list **Columns Available** and then click the **Add** button to add a new column to the table.

Use the **arrow** button to change the order of columns appear the table.

Select the heading for the column you want to remove from the list of **Columns to Display** and then click the **Remove** button.

When finished, select **Save** as Personal Defaults.

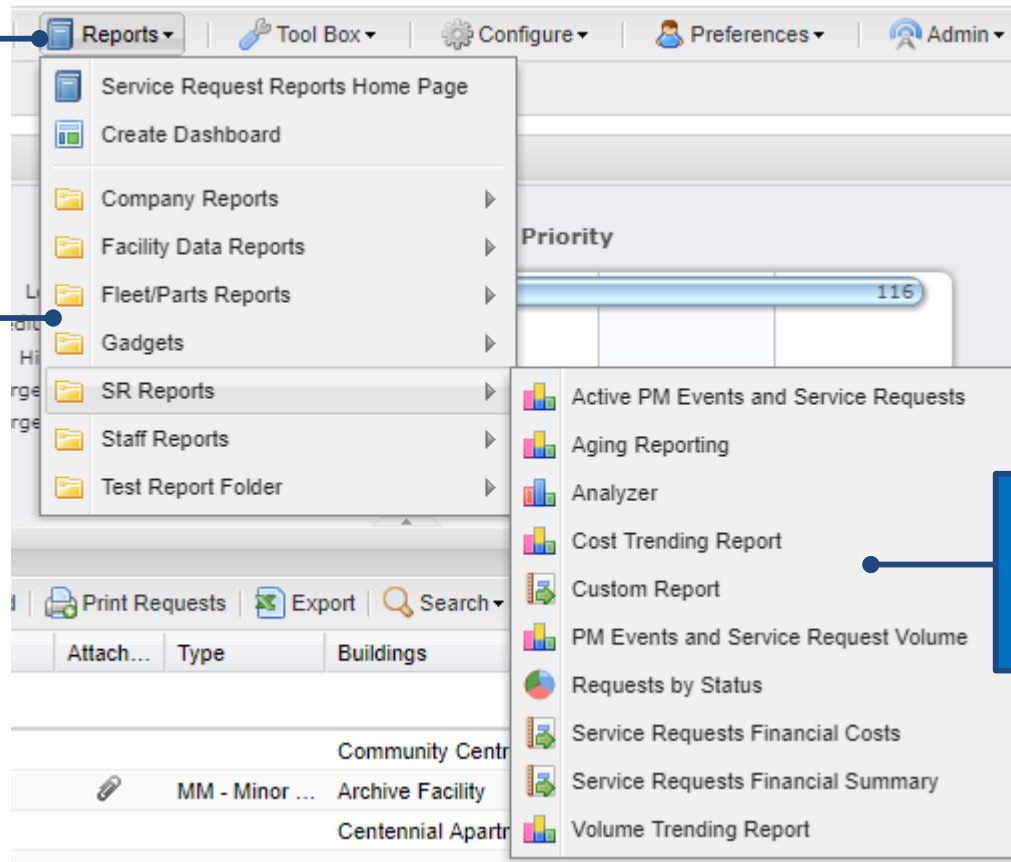
Use the **Reset to Default** button to change back to the original order of columns.

Reports & Charts

Reports

The software has a menu button for **Reports** where ready built reports can be run to find service request data.

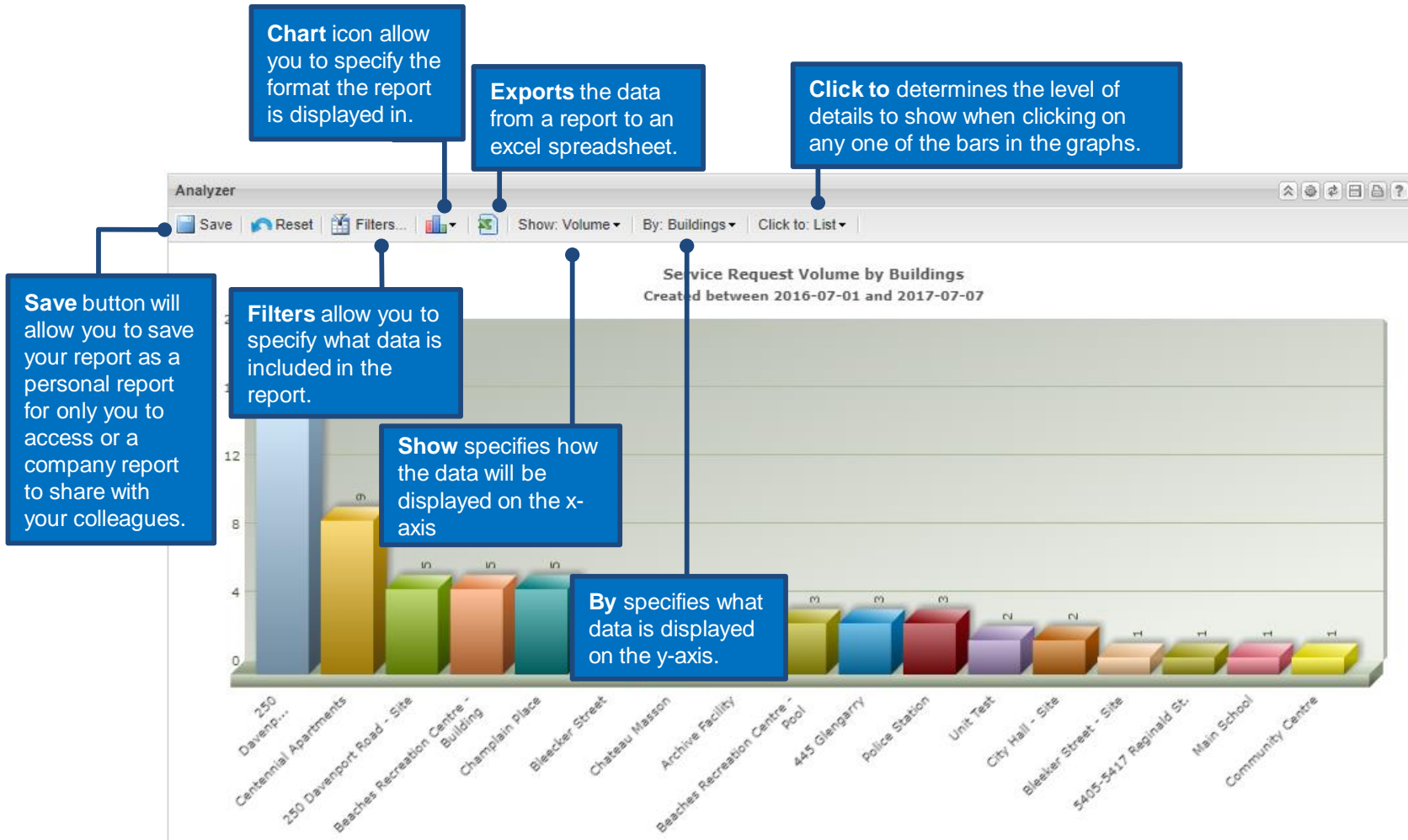
The reports menu has several folders listed there with numerous reports filed here and ready to use.



To run the report, simply navigate to the report of your choice and click on the report title.

Reports

Each report has numerous options to customize the report. Example below is Analyzer Report.



Note: Specify a custom title and description in order to remember what filters were applied to a saved report.

Reports

In the top right corner of each report are additional settings.

The screenshot shows the 'Analyzer' application window. At the top right, there is a toolbar with icons for Save, Reset, Filters, Show, Refresh, Print, and Help. Below the toolbar is a 3D bar chart titled 'Service Request Volume by Buildings' showing data for various buildings. A 'Chart Settings' dialog box is open, showing options for Report Title, Description, Chart Title, Subtitle, Chart Type, Show values, Legend, Font Size, and Scope. Callout boxes provide instructions for the icons:

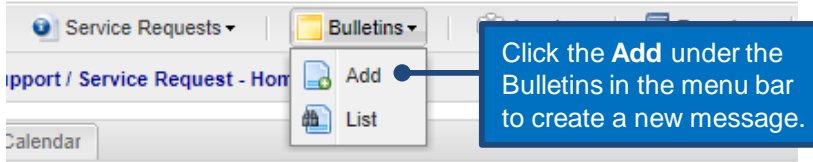
- Refresh icon** let you refresh just the report instead of the entire web page.
- Dish icon** saves a chart as a .jpg image.
- Print icon** allow you to print just the chart.
- Gear icon** customize whether or not your report shows values, a legend and the font size.

Building	Volume
250 Davenport	16
Centennial Apartments	10
250 Davenport Road - Site	10
Beaches Recreation Centre - Building	10
Champlain place	10
Reginald St.	10
Main School	10
Community Centre	10

Bulletins

User Preferences

Service Request bulletins are displayed to your clients on the Client Service Request home page.



A screenshot of the 'New Bulletin Message' form. The form has a title bar with 'New Bulletin Message' and a toolbar with 'Save', 'Back', 'Delete', and 'Help' buttons. Below the toolbar, there is a section for '*Bulletin Types:' with three bullet points: 'Information: Displays on Client site home page.', 'Alert: Displays on Client site home page with Alert icon', and 'Staff Alert: Displays on SR and PM forms for alerting staff for specific items related to facility.' Below this, there are several fields: 'Date: 2017-08-16 15:28:06', 'Subject: [text input]', '*Type: Information [dropdown]', 'Buildings: [dropdown]', 'Status: Visible [dropdown]', and 'Display Until: [calendar icon] (if blank will display until max...)'. At the bottom, there is a large text area with the text 'Type Bulletin Message Here'. A blue callout box points to the 'Subject' field with the text: 'Create a **Subject** line for the bulletin.' Another blue callout box points to the '*Type' dropdown with the text: 'Select the **Type** to determine if the bulletin is for the purpose of *Information* or for an *Alert* as well as a *Staff Alert* only.' A third blue callout box points to the 'Buildings' dropdown with the text: 'Pick one or more **Building/Facilities** that need to view the bulletin. Leaving the field empty indicates all facilities should see the bulletin.' A fourth blue callout box points to the 'Status' dropdown with the text: 'Choose between *Visible* and *Hidden* in the **Status** field to determine when the bulletin will be visible to the Client Viewers.' A fifth blue callout box points to the 'Display Until' field with the text: 'Set a date for when the bulletin will expire from being viewed by the Client Users.'

Dashboards

Dashboards

Dashboards allow you to quickly and easily access 2-6 of your favorite reports all on a single page.

The screenshot shows a web application interface for dashboard management. At the top, there is a navigation bar with tabs for Home, My Dashboard, Favorites, Service Requests, Bulletins, Assets, Reports, Tool Box, and Configure. Below this, a sub-header shows 'Re-select or remove My Dashboard' and 'Anita's Dashboard'. The main content area displays two charts: 'PM Workload Effort by Buildings' and 'Service Request Volume by Buildings'. A dialog box is open in the foreground, titled 'Select an existing dashboard to display as My Dashboard'. The dialog contains instructions and a table of available dashboards.

Re-select your default dashboard or create a new dashboard customizing the layout and choosing to include all your favorite charts.

Title	Scope	Description
Anita's Dashboard	Company	
E&S Dashboard	Company	
Needs Review Dashboard	Company	
PM & SR Dashboard	Company	

Buttons at the bottom of the dialog: Set as home Dashboard, Remove home Dashboard, Create a new Dashboard.