



AssetPlanner™ **Service Request Module**

Client User Quick Start Guide

2020

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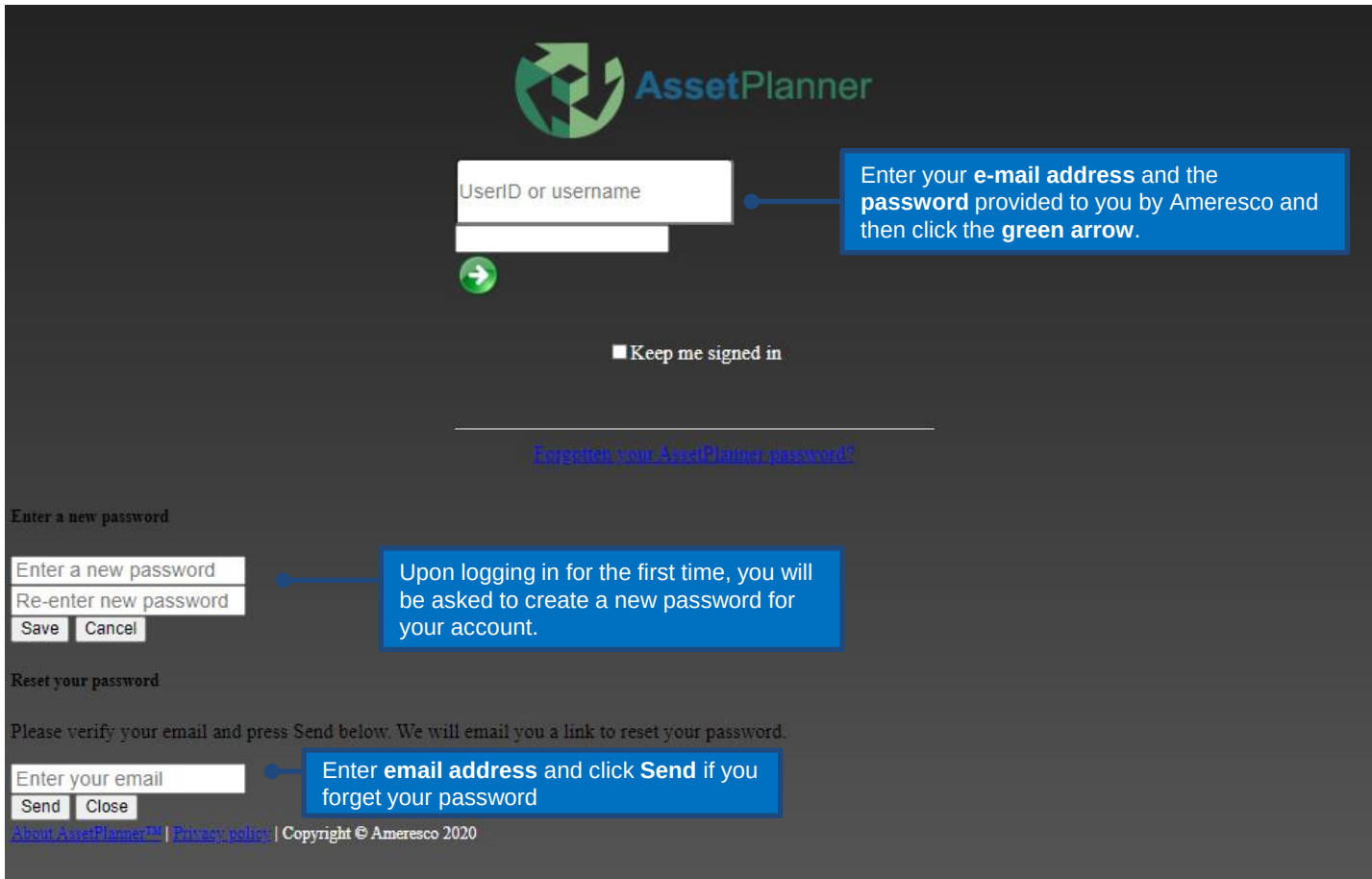
A vertical bar with a gradient from light blue at the top to orange at the bottom.

GETTING STARTED:

Web Link & Login

Web Link & Login

www.AssetPlanner.com



The screenshot shows the AssetPlanner login interface. At the top is the AssetPlanner logo. Below it are two input fields for 'UserID or username' and 'password', with a green arrow button below them. A blue callout box points to these fields with the text: 'Enter your **e-mail address** and the **password** provided to you by Ameresco and then click the **green arrow**.' Below the login fields is a checkbox labeled 'Keep me signed in' and a link 'Forgotten your AssetPlanner password?'. The 'Enter a new password' section has two input fields for 'Enter a new password' and 'Re-enter new password', with 'Save' and 'Cancel' buttons. A blue callout box points to these fields with the text: 'Upon logging in for the first time, you will be asked to create a new password for your account.' The 'Reset your password' section has a text prompt 'Please verify your email and press Send below. We will email you a link to reset your password.' and an input field for 'Enter your email' with 'Send' and 'Close' buttons. A blue callout box points to the email field with the text: 'Enter **email address** and click **Send** if you forget your password'. At the bottom are links for 'About AssetPlanner™' and 'Privacy policy', and a copyright notice 'Copyright © Ameresco 2020'.

AssetPlanner

UserID or username

password

Enter your **e-mail address** and the **password** provided to you by Ameresco and then click the **green arrow**.

☐ Keep me signed in

[Forgotten your AssetPlanner password?](#)

Enter a new password

Enter a new password

Re-enter new password

Save Cancel

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

Reset your password

Please verify your email and press Send below. We will email you a link to reset your password.

Enter your email

Send Close

Enter **email address** and click **Send** if you forget your password

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Note: The log in page support the Single Sign-on.



A vertical bar with a gradient from light blue at the top to orange at the bottom.

NAVIGATION

Home Screen Layout

The home page is divided into three main sections:

The screenshot displays the home page of the Service Request System. The interface includes a top Menu Bar with links to Home, New Request, My Requests, Search Requests, Documents, and My Profile. A left Navigator Bar lists options like New Request, My Requests, Search Requests, Approve Requests, Knowledge Base, My Profile, and Switch Database. The main content area features a welcome message, instructions on how to use the system, emergency contact information, and a section for Fire Alarm Panel Inspections. Three callout boxes provide additional context: one for the Menu Bar, one for the Navigator Bar, and one for the Welcome Messages and Bulletins section.

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

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.

Welcome Messages and Bulletins

Service Request Client / Home

Welcome to the (CLIENT NAME) Service Request System!

Please use this system to request Facilities Management services. Use the "New Request" link to create a new request. Once created you will receive Email communications as we update the status of your request. You may also track the status of your request online using the "My Requests" link.

If this is an emergency, refer to your **RED EMERGENCY BINDER** and follow the instructions.

If this is an urgent request, call the Facilities Service Centre 24 hour line at 1-866-555-5555 and follow the prompts.

Facilities Service Centre email: facilitieservicecentre@demo.us.com

Fire Alarm Panel Inspections

We will be contacting each facility to let them know when their fire panel inspections are going to be scheduled. Only those facilities that need to be contacted will receive an email.



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.

The screenshot displays the 'Service Request Client / Home' interface. The top navigation bar includes links for Home, New Request, My Requests, Search Requests, Documents, and My Profile. A secondary bar shows Service Requests, Attachments (45), and a Print/Help button. The main content area shows a folder named 'Asset Planner - Maintenance Planner_App.pdf' with a PDF icon. A sidebar on the left lists various planning and support categories. Callouts provide instructions on using the Arrow Button, the Print button, and the Home/Logout buttons.

Service Request Client / Home

Attachments (45)

Folders

Documents / Asset Planner - Maintenance Planner_App.pdf

PDF

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

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

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

Asset Planning

Project Planning

Energy & Sustainability

Preventative Maintenance

Service Request Support

Service Request Client

Lease Planning

Knowledge Base

Analytics Planner

Logout

User Profile

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

The screenshot shows the 'Service Request Client / My Profile' interface. The top navigation bar includes links for Home, New Request, My Requests, Search Requests, Documents, and My Profile. A callout points to the 'My Profile' link, stating: 'Click the **My Profile** in the menu bar or in the **Navigator bar** and adjust the fields required with the correct information.'

The left sidebar, titled 'Service Requests:', contains a 'Navigator bar' with links: New Request, My Requests, Search Requests, Approve Request, Knowledge Base, My Profile, and Switch Database. A callout points to the 'My Profile' link, stating: 'Field include **Names**, **Phone Numbers**, and the ability to **change password**'.

The main content area, titled 'Profile information', contains the following fields:

- User ID (Email): mtui@ameresco.com
- First Name: Mary
- Last Name: Tiu
- Change Password button
- Phone: [text box]
- Mobile Phone: [text box]
- Facility: [dropdown menu]
- Department: [dropdown menu]
- Office: [text box]
- Email Notifications: Yes [dropdown menu]
- Notes Display Order: Display Most Recent Note Last [dropdown menu]

At the bottom right of the form are buttons for Save, Cancel, Logout, and Help. A callout points to the 'Save' button, stating: 'Remember to press **Save** after completing your adjustments.'

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



A vertical bar with a gradient from light blue at the top to orange at the bottom.

SERVICE REQUEST

Create a Service Request

The screenshot shows the 'Service Request Client / New Request' web application. The top navigation bar includes links for Home, New Request, My Requests, Search Requests, Documents, and My Profile. A left sidebar titled 'Service Requests:' contains links for New Request, My Requests, Search Requests, Approve Requests, Knowledge Base, and My Profile. The main content area is titled 'NEW SERVICE REQUEST' and includes a 'Step 1' instruction: 'Please confirm your phone number select the Request Type, and set the Priority of your request. If the Type of request you are making is not listed please choose the "Other" selection and provide details on the next page.' The form itself is divided into two sections: 'Contact information' and 'Request Specification'. The 'Contact information' section has fields for Name (Mary Tiu), Phone (required), Mobile Phone, and CC Email. The 'Request Specification' section has fields for Asset (required), Type of Request (required), Priority (Low), Req. Completion Date, Floor, and Location/Room #. A 'Browse...' button is next to the Asset field. A legend at the bottom left states '* denotes a required field.' At the bottom right are 'Cancel' and 'Next' buttons. Five blue callout boxes provide instructions: 1. 'Click the New Request on the menu bar or on the quick link shown in the Navigator bar' (pointing to the sidebar). 2. 'Complete the fields that have an * asterisk beside them. These are information fields your support team requires to respond effectively to your request.' (pointing to the Phone field). 3. '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.' (pointing to the Type of Request dropdown). 4. 'Click Next after completing the fields in this form.' (pointing to the Next button). 5. A 'Browse...' button is also present next to the Asset field.

Service Requests:

- New Request
- My Requests
- Search Requests
- Approve Requests
- Knowledge Base
- My Profile

Service Request Client / New Request

NEW SERVICE REQUEST

Step 1:
Please confirm your phone number select the Request Type, and set the Priority of your request.
If the Type of request you are making is not listed please choose the "Other" selection and provide details on the next page.

New Request

Contact information

Name: Mary Tiu

Phone:*

Mobile Phone:

CC Email:

Request Specification

Asset:*

Type of Request:*

Priority:* Low

Req. Completion Date:

Floor:

Location/Room #:

* denotes a required field.

Cancel

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

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

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.

The screenshot displays the 'Service Request Client / New Request' interface. The page is divided into two main sections: 'NEW SERVICE REQUEST' on the left and 'New Request' on the right. The 'NEW SERVICE REQUEST' section includes a document icon and instructions for Step 2: 'Please provide as much information as possible to help us provide the quickest response to your request. Then press Submit to create your new request.' The 'New Request' section has a 'Details' subsection with a prompt: 'Please indicate the ceiling section in question. Is this a safety issue?'. Below this is a large text area for details. To the right of the text area is a blue callout box stating: '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.' Below the text area is an 'Attachment:' section with a 'Choose File' button, 'No file chosen' text, and a note '(You may attach up to 3 files)'. A blue callout box points to the 'Choose File' button, stating: 'If applicable, the requestor can include/attach up to 3 files or documents to support the request. Documents are sourced from your computer file after clicking on **Choose File**. Ex. Pictures, word documents, excel files, card drawings, etc.' Below the attachment section is a 'Submit' button. A blue callout box points to the 'Submit' button, stating: 'To complete the process, click **Submit** button and the request will be entered into the system.' At the bottom of the page, there is a 'Thank You' message: 'Thank You We will contact you later regarding your request.' and a 'Finished' button.

Service Request Client / New Request

NEW SERVICE REQUEST

Step 2:
Please provide as much information as possible to help us provide the quickest response to your request. Then press Submit to create your new request.

New Request

Details

Please indicate the ceiling section in question. Is this a safety issue?

Attachment: Choose File No file chosen (You may attach up to 3 files)

attach another file

Back Submit

Thank You
We will contact you later regarding your request.

New Service Request Created

Service Request SR001848 has been created.

You may check on the status of your request at any time or provide more information to us by using the My Requests link above.

Finished

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SEARCH SERVICE REQUEST DATA

List / Search Service Request Data

Some facilities may have more than one requestor.

The screenshot displays the 'Service Request Client / Search for Service Requests' interface. The top navigation bar includes links for Home, New Request, My Requests, Search Requests, Documents, and My Profile. A left-hand menu under 'Service Requests:' contains options: New Request, My Requests, Search Requests (highlighted), Approve Requests, Knowledge Base, My Profile, and Switch Database. The main area is titled 'Search Criteria' and contains the following fields:

- Service Request #: [Text Input]
- Status: [Dropdown Menu]
- ☒ Hide Closed Requests
- Requestor Name: [Text Input]
- Work Order: [Text Input]
- Department: [Dropdown Menu]
- Facility: [Dropdown Menu]
- Location/Room #: [Dropdown Menu]
- Summary contains: [Text Input]
- Details contains: [Text Input]
- Starting Date: [Date Picker]
- Ending Date: [Date Picker]

At the bottom right of the form are buttons for Search, Cancel, and Help. Three blue callout boxes provide instructions: one points to the 'Search Requests' menu item, another points to the search criteria form, and a third points to the 'Search' button.

Click the **Search Service Request** on the menu bar or on the quick links in the navigation bar.

You will be directed to a form where you will be provided with a number of filtering options.

Press **Search** when finish populating the filter fields to produce the list of service request that fit the filter criteria.



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

Search Results

Pages: < 1 2 3 8 >

Select all Unselect Select between Display all Export Customize

Request	Date	Status	Pending	Priority	Requestor	Summary	Service Provider
 SR019739	2020-06-19 11:42:01	New		Low	Anita Wilson	Electrical - Interior Lighting	
 SR019738	2020-06-10 18:13:08	New		Low	Scott Cripps (ASG)	Plumbing - Other	General Contractor Inc.
 SR019737	2020-06-10 18:09:23	Pending	Parts	Low	Scott Cripps (ASG)	Leak - Roof	
 SR019736	2020-06-10 18:04:15	New		Urgent	Scott Cripps (ASG)	Plumbing - Sinks/Faucets	
 SR019735	2020-06-10 18:04:15	Progress		Urgent	Scott Cripps (ASG)	Air Quality	Electrical Experts Inc.
 SR019734	2020-06-10 18:04:15			Urgent	Scott Cripps (ASG)	Ceilings - Gyprock/Painted	Electrical Experts Inc.
 SR019340	2020-04-09 10:10:09	New		Low	Anita Wilson	Ceilings - Suspended	
 SR019339	2020-04-09 10:10:09	New		Urgent	Scott Cripps (ASG)	HVAC - Heating	Electrical Experts Inc.
 SR019338	2020-04-09 10:10:09	New		Low	Scott Cripps (ASG)	Electrical - Exterior Lighting	
 SR019337	2020-04-09 10:10:09	New		Low	Scott Cripps (ASG)	HVAC - Cooling	
 SR019336	2020-04-09 10:10:09	New		Low	Scott Cripps (ASG)	Air Quality	Electrical Experts Inc.

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
-  Work in Progress
-  New Notes
-  Pending
-  Closed

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



List / Search Service Request Data

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

The screenshot shows the 'Customize Columns' dialog box. It has a title bar 'Customize Columns' and a subtitle 'Select the order and the columns to be displayed for this page.' The dialog is divided into two main sections: 'Columns to Display' on the left and 'Columns Available' on the right. The 'Columns to Display' list contains: Request, Date, Status, Pending, Priority, Requestor, Summary, and Service Provider. The 'Columns Available' list contains: Actual Start Date, Asset, Assigned Group, Assigned To, Block, Budget Number, BudgetTitle, Category, CreatedBy, Date Closed, Date Completed, Department, Description, Estimated Cost, and Floor. Between the two lists are two buttons: '<< Add' and 'Remove >>'. Below the 'Columns Available' list is a note: '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.' Below the note is a checkbox labeled 'Reset all users settings for this form'. At the bottom of the dialog, there are two sections: 'Company Wide Defaults:' with 'Save' and 'Reset to Default' buttons, and 'Personal Defaults:' with 'Save', 'Reset to Default', and 'Cancel' buttons. Annotations with arrows point to various parts of the dialog: 1. A blue box on the top left says 'Items listed here are columns that are currently displayed in your table.' pointing to the 'Columns to Display' list. 2. A blue box on the middle left says 'Use the arrow Up and Down to change the order of which columns appear in your table.' pointing to the up and down arrow buttons between the two lists. 3. A blue box in the center says 'Use the Add and Remove button to move an item from left to right and right to left. Highlight/Select the item that you wish to move then press the Add or Remove button.' pointing to the '<< Add' and 'Remove >>' buttons. 4. A blue box on the middle right says 'Items listed here are the columns available for you to include in your table.' pointing to the 'Columns Available' list. 5. A blue box at the bottom left says 'Press the Save button when changes are done.' pointing to the 'Save' button under 'Company Wide Defaults'. 6. A blue box at the bottom right says 'Use the Reset to Default button to change back to the original order of columns.' pointing to the 'Reset to Default' button under 'Personal Defaults'.

Items listed here are columns that are currently displayed in your table.

Use the arrow Up and Down to change the order of which columns appear in your table.

Use the Add and Remove button to move an item from left to right and right to left. Highlight/Select the item that you wish to move then press the Add or Remove button.

Items listed here are the columns available for you to include in your table.

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

Press the Save button when changes are done.

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



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.

Service RequestSR019739

Request Details		Location / Assignment	
Request #:	SR019739	Asset:	Conroe Library
Requestor:	Anita Wilson	Floor:	
Date Submitted:	2020-06-19 11:42:01	Location/Room #:	202
Submitted By:	Anita Wilson	Work Order #:	
Req. Completion Date		Group Assigned:	
Date Completed:		Individual Assigned:	
Status:	New	Service Provider:	
Attachments:	Add		

Description

Summary: Electrical - Interior Lighting

Details: TEST REQUEST

Notes

[+ Add Note](#)

To provide more information or inquire about the status of this request, press the Add Note button and enter your comments. Comments you provide will be emailed to the assigned person(s).

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.



A vertical bar with a gradient from light blue at the top to orange at the bottom.

BULLETINS

Bulletins

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

Service Request Client / Home

PrintHelp

Welcome to the (CLIENT NAME) Service Request System!

Please use this system to request Facilities Management services. Use the "New Request" link to create a new request. Once created you will receive Email communications as we update the status of your request. You may also track the status of your request online using the "My Requests" link.

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If this is an urgent request, call the Facilities Service Centre 24 hour line at 1-866-555-5555 and follow the prompts.

Facilities Service Centre email: facilityesservicecentre@demo.us.com

 **Fire Alarm Panel Inspections**

We will be contacting each facility to let them know when their fire panel inspections are going to be scheduled. Only those facilities that need to be contacted will receive an email.

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.



Thank You!

Please contact your local Facility
Maintenance Office for questions
regarding your processes.

For questions regarding the
software, our AssetPlanner™

Support Line number is:

1-855-583-2627 or

support@assetplanner.com