



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

Home Screen Layout

The home page is divided into three main sections:

The screenshot shows the 'Service Request Client / Home' interface. At the top is a Menu Bar with links for Home, New Request, My Requests, Search Requests, Documents, and My Profile. On the left is a Navigator Bar with buttons for New Request, My Requests, Search Requests, Approve Requests, My Profile, and Switch Database, plus a Shortcuts section. The main content area features a welcome message, a test section with sample syllabic text, and a Test Bulletin section. Three callout boxes provide additional context: one for the Menu Bar, one for the Navigator Bar, and one for the Welcome Messages.

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

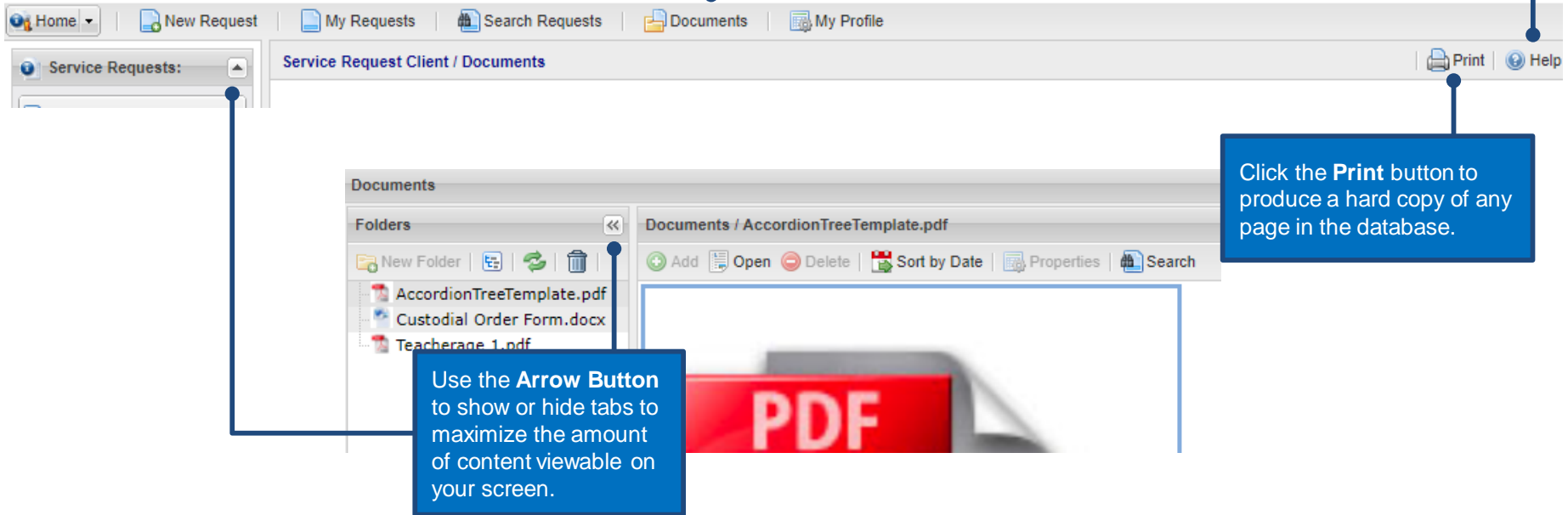
The **Navigator Bar** provides the same links shown at the menu bar along with the option for **Shortcuts** to other websites that may need to be frequently referred to and provided by the Support Team.

Welcome Messages and Bulletins

Navigation Tools

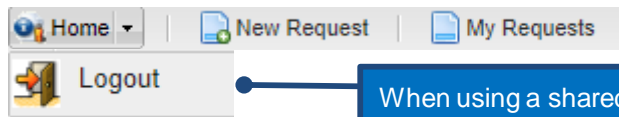
The Support team may share various types of documents with the requestors.

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



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.

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

Home | New Request | My Requests | Search Requests | Documents | My Profile

Service Requests:

- New Request
- My Requests
- Search Requests
- Approve Requests
- My Profile
- Switch Database

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 Dollano

Phone: *

Mobile Phone:

CC Email:

Request Specification

Buildings: *

Type of Request: *

Priority: Low

Req. Completion Date:

CUSTOM 1:

CUSTOM 2:

Budget Number:

Asset: Type here to search for related Asset...

Location/Room #:

* denotes a required field.

Cancel Next >>

Print

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.

Service Request Client / New Request Print Help



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 Facility, Building and Room with the problem.
Are other outlets in your room experiencing the same problem, or just one?

Text area for providing details of the request.

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 your computer file after clicking on **Choose File**. Ex. Pictures, word documents, excel files, card drawings, etc.

Attachment: No file chosen

(You may attach up to 3 files)

[attach another file](#)

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.

<< Back

Submit

Service Request Client / New Request

Print Help



NEW SERVICE REQUEST

Thank-You
We will contact you later regarding your request.

New Request

New Service Request Created

Service Request SR001669 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

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.

The screenshot displays the 'Service Request Client / Search for Service Requests' interface. The top navigation bar includes 'Home', 'New Request', 'My Requests', 'Search Requests', 'Documents', and 'My Profile'. A left-hand navigation pane lists 'Service Requests' with sub-options: 'New Request', 'My Requests', 'Search Requests', 'Approve Requests', 'My Profile', and 'Switch Database'. Below this is a 'Shortcuts' section. The main content area is titled 'Search Criteria' and contains the following fields:

- Service Request #:
- Status:
- Hide Closed Requests
- Requestor Name:
- Work Order:
- Department:
- Facility:
- Location/Room #:
- Summary contains:
- Details contains:
- Starting Date:
- Ending Date:

At the bottom right of the form are three buttons: 'Search', 'Cancel', and 'Help'. Three blue callout boxes provide instructions:

- One points to the 'Search Requests' link in the navigation bar: "Click the **Search Service Request** on the menu bar or on the quick links in the navigation bar."
- Another points to the 'Hide Closed Requests' checkbox: "You will be directed to a form where you will be provided with a number of filtering options."
- The third points to the 'Search' button: "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 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		Donn
SR001666	2017-09-19 15:30:32	New	Low	Community Centre	need to pails of soap		Donn
SR001665			Low	City Hall - Site	VANDALISM - Interior		Donn
SR001664			High	Recreation Centre	Ceilings - Water Stains		Anita Wilson
SR001663			Low	Community Centre	Ceilings - Water Stains		Anita Wilson
SR001662			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.

The screenshot shows a 'Customize Columns' dialog box with the following components and callouts:

- Items listed here are columns that are displayed in your table.** Points to the 'Columns to Display' list containing: Request, Date, Status, Priority, Buildings, Summary, Service Provider, and Requestor.
- Use the arrow Up and Down to change the order of which columns appear in your table.** Points to the up and down arrow buttons next to the 'Columns to Display' list.
- 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.** Points to the '<< Add' and 'Remove >>' buttons between the two lists.
- Items listed here are the columns available for you to include in your table.** Points to the 'Columns Available' list containing: Actual Start Date, Assigned Group, Assigned To, Block, Budget Item, CUSTOM 1, CUSTOM 2, Category, CreatedBy, Date Closed, Date Completed, Department, Description, Estimated Cost, and Floor.
- Press the Save button when changes are done.** Points to the 'Save' button in the 'Company Wide Defaults' section.

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

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.

The screenshot displays the 'Service Request SR001669' interface. It is divided into several sections:

- Request Details:** A table with the following information:

Request #:	SR001669
Requestor:	Mary Dollano
Date Submitted:	2017-10-03 16:21:26
Submitted By:	Mary Dollano
Req. Completion Date	
Date Completed:	
Status:	New
Attachments:	<input type="button" value="Add"/>
- Location / Assignment:** A table with the following information:

Buildings:	250 Davenport Road
Location/Room #:	CUSTOM 1
	CUSTOM 2
Work Order #:	
Group Assigned:	
Individual Assigned:	
Service Provider:	
- Description:** A section with a 'Summary' field containing 'Electrical - No Power At Outlet' and a 'Details' field containing 'No. Sample only'.
- Notes (0):** A section with an 'Add Note' button and a message: '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.

Bulletins

