

AssetPlanner®

Service Request Client User Quick Start Guide

2024

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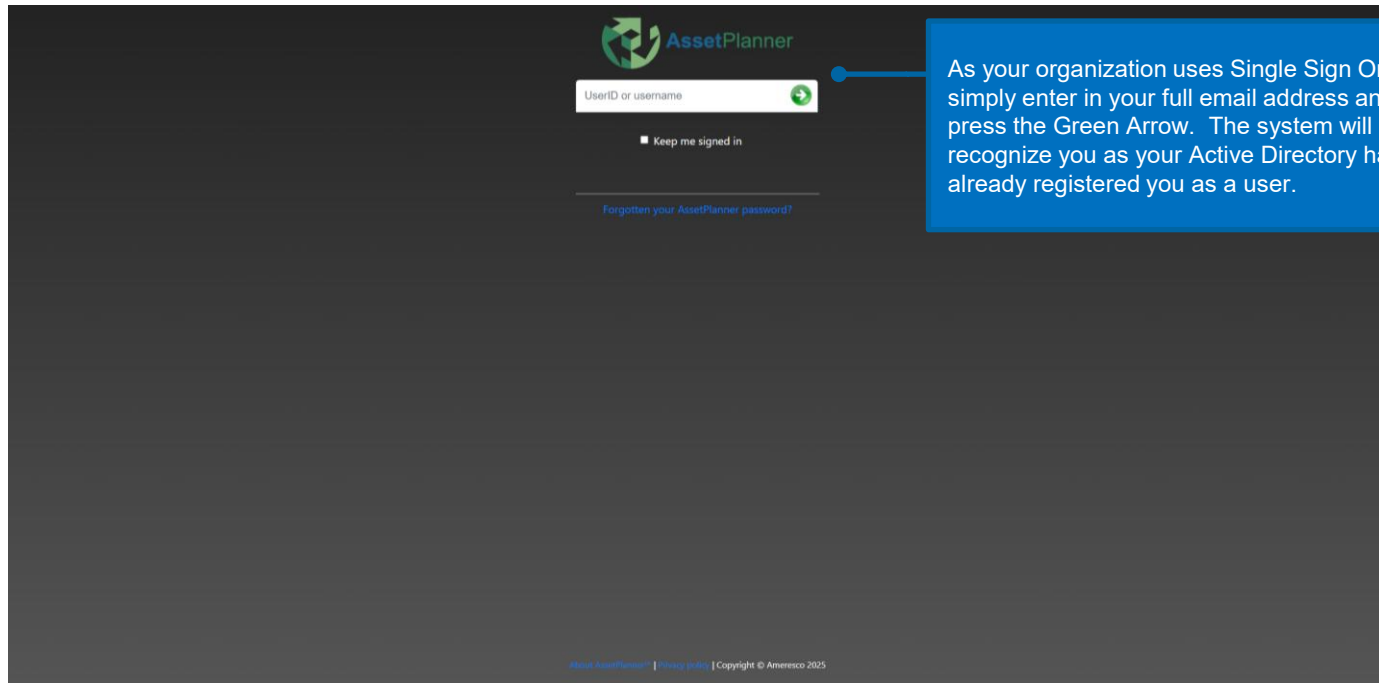
Bulletins

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

Web Link & Login

Web Link and Login

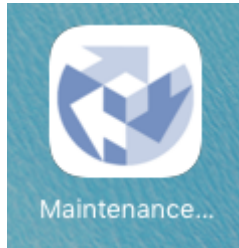
<https://us.assetplanner.com/>



As your organization uses Single Sign On, simply enter in your full email address and press the Green Arrow. The system will recognize you as your Active Directory has already registered you as a user.

Mobile Application Login

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



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

A desktop browser window titled "Login" with a white background. It contains an "Email" field with the text "test@ameresco.com", a "Server" dropdown menu currently showing "Canada", and a blue "Next →" button at the bottom.

Ensure the correct server is selected.
**Select Canada for Canadian users
and United States for US users.

A mobile app login screen with a grey background. It has an "Email" field with "test@ameresco.com" and a "Server" dropdown showing "Canada". A white dialog box titled "Server" is open, listing "Canada" (selected with a checkmark), "United States", "Training", "Staging", and "Development". "Cancel" and "OK" buttons are at the bottom of the dialog.

A vertical bar with a gradient from light blue at the top to orange at the bottom, positioned to the left of the main title.

Home Page & Navigation

Home Screen – Help Tab

The help and dashboard screens are shown on the top right. Navigation of requests, documents and modules is available on the left side of the screen.

The screenshot shows the 'Asset Planner K-12 Demo' interface. On the left is a 'Navigator Bar' with icons and labels for Home, New Request, Materials Request, My Requests, Search Requests, Approve Requests, Documents, Knowledge Base, Profile, and AssetPlanner. The main content area is titled 'DASHBOARD' and 'HELP'. The 'HELP' tab is active, displaying a welcome message: 'Welcome to the (CLIENT NAME) Work Order System!'. Below this is a paragraph: '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.' This is followed by two lines of emergency and urgent request instructions, and a Facilities Service Centre email address: facilitieservicecentre@demo.us.com. At the bottom, there is a 'Client Bulletin' titled 'Fire Alarm Panel Inspections' with the text: '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.'

The Navigator Bar provides shortcuts and actions. Your organization may customize by adding links to the bottom of the Navigation Bar.

Help provides information that is important to share with your clients. It is customizable and includes the opportunity to welcome users to the system and guide their use of the software while providing them insight into internal organizational processes..

Client Bulletins will appear on both the Dashboard and Help menus.

Home Screen - Dashboard

Asset Planner K-12 Demo

DASHBOARD

Your Requests:

8 Open Requests	0 Recently Updated	3 Closed Requests	0 Approvals Required
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Client Bulletin
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.

Client Bulletins will appear on both the Dashboard and Help menus.

Home

New Request

Materials Request

My Requests

Search Requests

Approve Requests

Documents

Knowledge Base

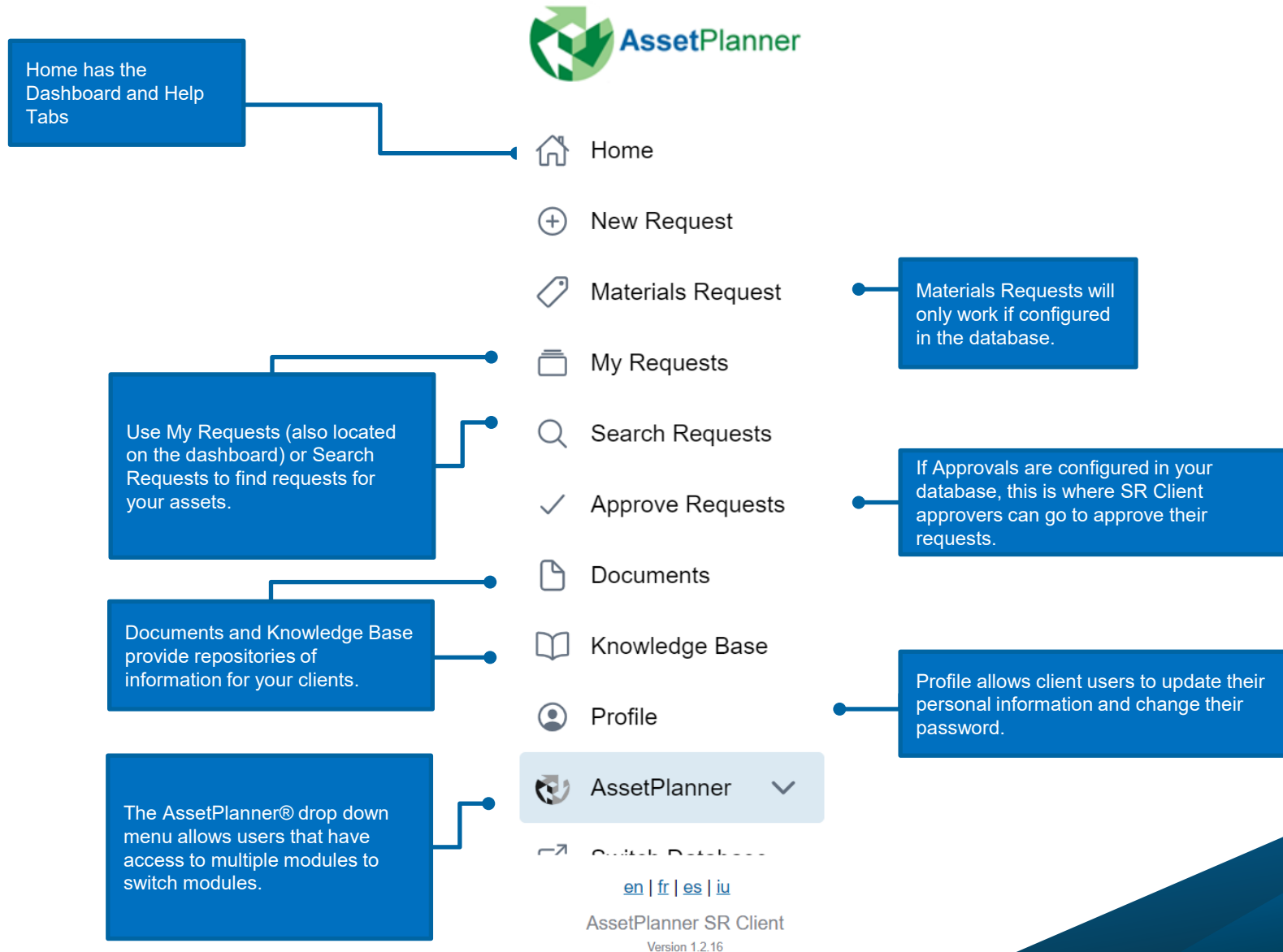
Profile

AssetPlanner

en | fr | es | it

AssetPlanner SR Client
Version 1.2.16

Navigation Menu - Details








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

Creating New Service Requests

Create A New Request

To Create a New Request use the 'New Request' Button on the Navigation Menu located on the left side of the screen.



-  Home
-  New Request
-  Materials Request
-  My Requests
-  Search Requests

Click **New Request** on the navigation bar on the Navigation bar.

Contact Details

Enter your contact details if they don't pre-populate. Use the Copy E-mail function to include others on notifications pertaining to the request. Note that Fields that have an * **asterisk** beside them are Mandatory fields and must be filled out.

The screenshot shows a 'Contact Details' form with the following fields:

- Contact**: Stephanie Dove
- *Phone**: +1 587-316-9592 (with a Canadian flag icon)
- Mobile Phone**: +1 XXX-XXX-XXXX (with a US flag icon)
- CC Email (to copy on notifications)**: (empty)

Callout boxes provide the following information:

- A box pointing to the 'Contact' and 'Phone' fields states: "Your **Name** will pre-populate. If your phone number is updated in your profile it will also pre-populate."
- A box pointing to the 'CC Email' field states: "If you want to Copy someone else on the Service Request add their e-mail address here. They will receive updates by e-mail based on company notification settings."

Asset & Location

Note that the available assets and locations can be adjusted by your organization. For example, your organization may limit your view so that you only see building assets. Likewise, organizations may choose to use a pre-populated list of room numbers or floor numbers. Be as specific as possible when indicating the Asset and Location.

Location	
*Asset	
Atherton Elementary	
*Floor	
1	
Location/Room #	
CR101	

Service Request Type and Details

The Type of Request is a searchable field that allows you to provide an overview of the request you are making. Prompt Text will appear based on the Type of Request you Select. The Prompt Text will appear above the details or Comments and will guide you through additional information the organization may need. Note that as AssetPlanner is customizable the fields you see may vary organization by organization and Type of Request by Type of Request.

Request Details

*Type of Request

Click in the Field to pick a Type of Request. Select the request type that is closest to your issue.

*Priority

Low

Priority may or may not appear. If the Priority is available, use the descriptions provided by your organization, viewable by clicking on the field, to select the most appropriate priority. See example descriptions.

Requested Completion

This field may or may not appear. If it does appear, you can use this field to tell the organization when you want the work done.

Details or Comments...

This field allows you to provide additional details that may not be relayed in the fields above. It is important to communicate the issue/concern/need. If the prompt text asks for specific details this is where you can include them.

Low
Greater than 5 days response

Medium
3 - 5 day response

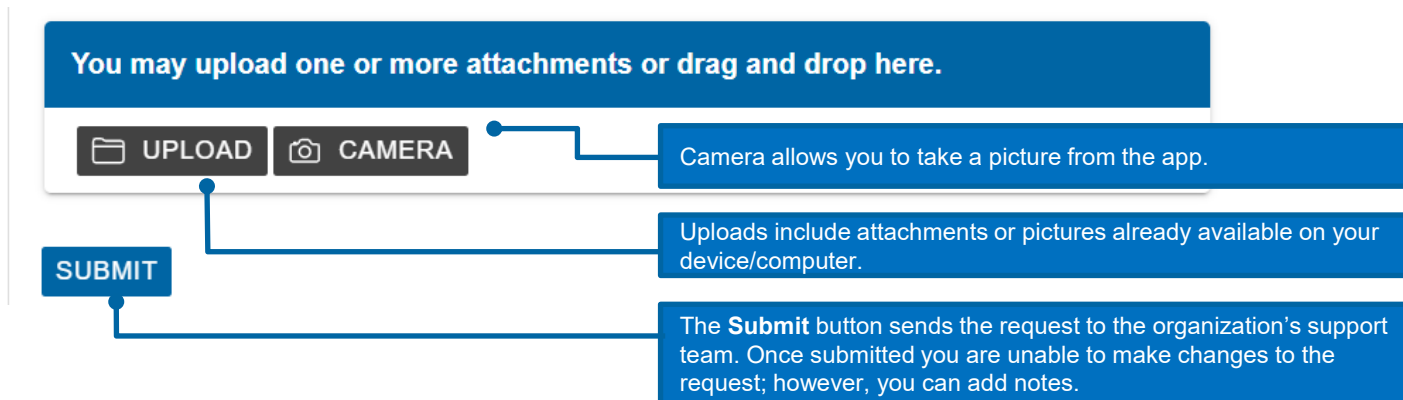
High
1 -3 day response

Urgent
Same day

Attachments & Pictures

Attaching a document/picture or using the camera to capture the issue, can provide necessary information for those supporting your request. A picture says a thousand words.

To add an attachment/picture it must be saved on your device. To take a picture from the app you must be using a device with a camera.



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






Searching Service Requests

My Requests VS Search Requests

My Requests on the Dashboard and Navigation Bar allows you to see requests you have submitted. Search Requests is only available on the Navigation Bar.

If enabled by the organization Search Requests may allow you to see requests submitted by others for your Assets. For clarification on the organizational process used by the organization speak to your database Administrator.



-  Home
-  New Request
-  Materials Request
-  My Requests
-  Search Requests

Use My Requests (also located on the dashboard) or Search Requests to find requests for your assets.

Finding/Sorting Service Requests

Open My Requests or Search Requests will bring up the screen below.

The screenshot shows a web interface for managing service requests. At the top, there's a breadcrumb 'Service Requests' and a filter 'Service Requests where Status != Closed'. Below that is a search bar. A table lists requests with columns for Request #, Asset, Asset / Equipm..., Notes, Attac..., Created, Status, Pending, Priority, Name, and Summary. Callout boxes provide instructions: 'This area shows any filters applied to the data.' points to the filter; 'Use the Search Field to search using specific words that may be included in the Service Request' points to the search bar; 'Allows the ability to hide/unhide closed requests easily.' points to the 'Hide closed requests' checkbox; 'The wheel/gear allows you to change the fields you see on the table view.' points to the gear icon; 'Changes the view from Grid to List.' points to the 'GRID' and 'LIST' tabs; 'Each column can be filtered/sorted. Click on the column heading to sort or the three lines to filter.' points to the column headers; 'The Box with an arrow allows you to download the list in excel.' points to the download icon; and 'The first column contains hyperlink to take you to the detailed view of the request.' points to the 'Request #' column.

Service Requests

Service Requests where Status != Closed

Search

GRID LIST

Hide closed requests

Request #	Asset	Asset / Equipm...	Notes	Attac...	Created	Status	Pending	Priority	Name	Summary
SR006288	Conroe Elementary			1	2019-10-30 10:39:16	Completed				
SR006295	North Creek Compositi			1	2020-10-30 08:57:08	Completed				
SR006838	Harrison Elementary				2021-09-29 18:00:00	Completed				
SR006840	Magna High School				2020-12-31 17:00:00	Completed				
SR006844	Sandy Bay Elementary				2020-10-31 18:00:00	Completed				

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

This area shows any filters applied to the data.

Use the Search Field to search using specific words that may be included in the Service Request

Allows the ability to hide/unhide closed requests easily.

The wheel/gear allows you to change the fields you see on the table view.

Changes the view from Grid to List.

Each column can be filtered/sorted. Click on the column heading to sort or the three lines to filter.


The Box with an arrow allows you to download the list in excel.

Service Request Details

Clicking on the blue link in the Finding Grid / List will bring up the details of the service request.

← SR006288

Request Details

 Scott Cripps (ASG) >

Created
2019-10-30 10:39:16

Last Updated
2023-01-17 15:57:43

Summary
Elevators [QKB](#)

Description
Test

The dates are shown first followed by the summary and description of the request.

Service Request Details - Communication

Notes are communication between the client and support teams. Click on Notes to open the Notes Screen.



Notes (0)



Materials Requested (0)



Pictures/Attachments (1)

Attachments/Pictures can be added by pressing 'Add'.

ADD



Attachments
- 2019-10-30 10:39:17

Click 'Add Note' to send a communication to the Assigned Group/Individual. This note is kept with the service request and will be visible for others.

ADD NOTE

All Notes will be visible (if there are any) in the details area below the SR number. Notes will include the name of the individual that added them, the date and the time added.

← SR006288 Notes

No Notes

Service Request Details – Other

Other fields may appear based on the settings of the organization. In the Status/Assignment section you will be able to see the group, individual and Service Provider (if/as assigned). You will also see the status and scheduled date.

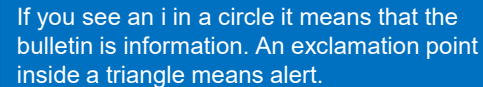
Status/Assignment
Status Completed
Pending
Priority Urgent
Requested Completion
Scheduled Start Date 2023-01-17 09:00:00
Actual Start Date
Date Completed 2023-01-17 15:57:00
Date Closed
Assigned Group
Assigned To Anita Wilson
Assisted By Anita Wilson
Service Provider

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

Bulletins

Bulletins

- From time to time, the organization may display bulletins. These will appear on the Home screen (both Dashboard and Help screens). Bulletins provide important information or alerts.



If you see an i in a circle it means that the bulletin is information. An exclamation point inside a triangle means alert.

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.



Thank You!

AssetPlanner™ Support Line:

1-855-583-2627

2024