



ameresco.com

AssetPlanner™ Maintenance Planner

Quick Start Guide

2021

Table of Contents

[Getting Started](#)

[Navigating the App](#)

[Preventative Maintenance](#)

[Service Requests](#)

[PM Assets](#)

[Facilities/Building / Asset Class](#)

GETTING STARTED:

Login

Login Page

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



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

The screenshot shows the login page for MaintenancePlanner. At the top, there is a header with the word "Login" in a grey bar. Below this is a form with several fields: an "Email" field with a red border, a "Password" field, and a "Server" dropdown menu currently set to "assetplanner.com". A blue "Login" button is positioned below the form. To the right of the form is a "Forgot your password?" section with a "Reset Password" button. A blue callout box on the right side of the page points to the "Reset Password" button.

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.

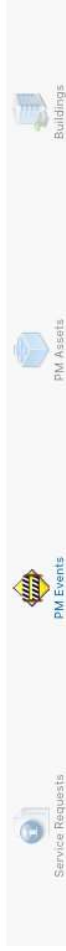


NAVIGATING THE APP

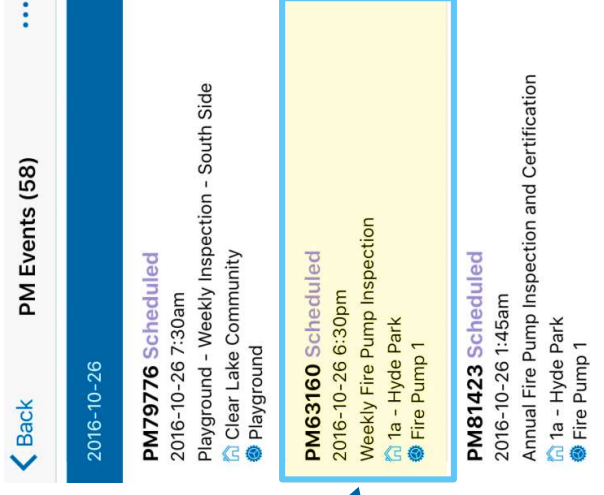


Navigating the App

MaintenancePlanner
 MaintenancePlanner allows you to access your AssetPlanner Service Requests, Asset Components, and Asset Classes.

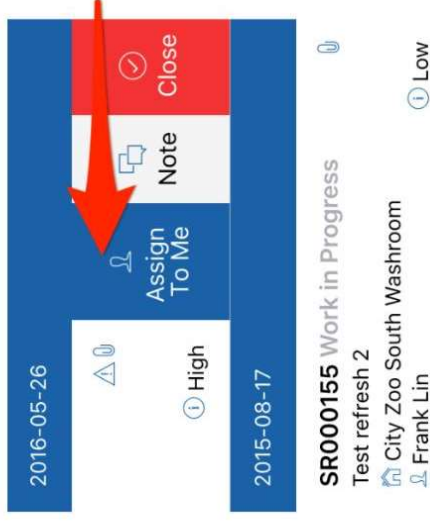


Events and requests assigned to you will appear as a slightly different color on the screen from all other open requests you have access to view.



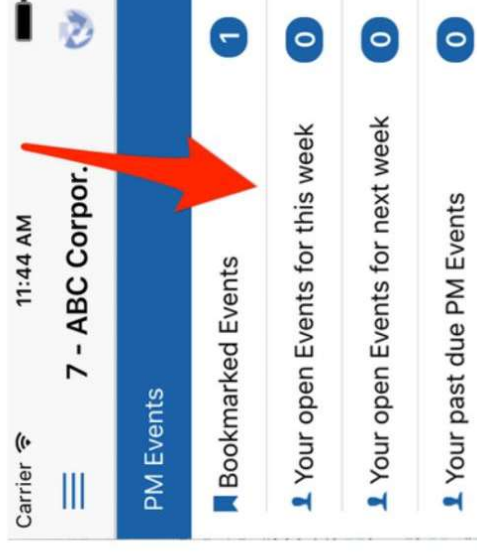
Swipe left/right

When viewing lists, slide an item right for actions and left for bookmarking.



Refresh Stats

On the dashboards, use the pull down gesture to refresh the data at any time.



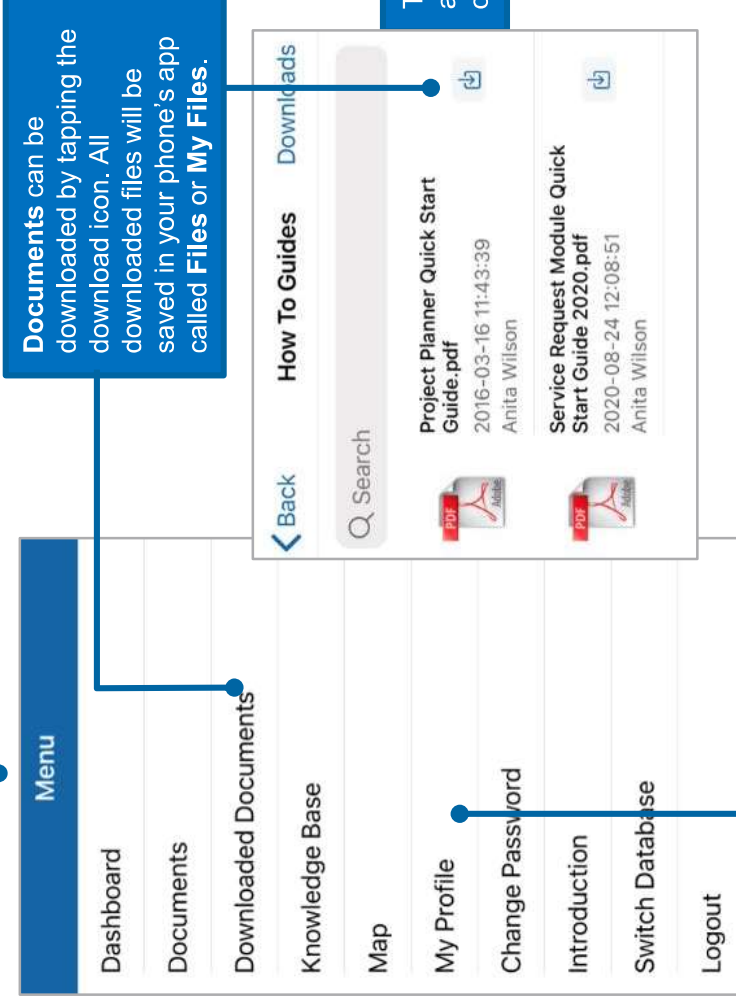
ICONS DEFINED



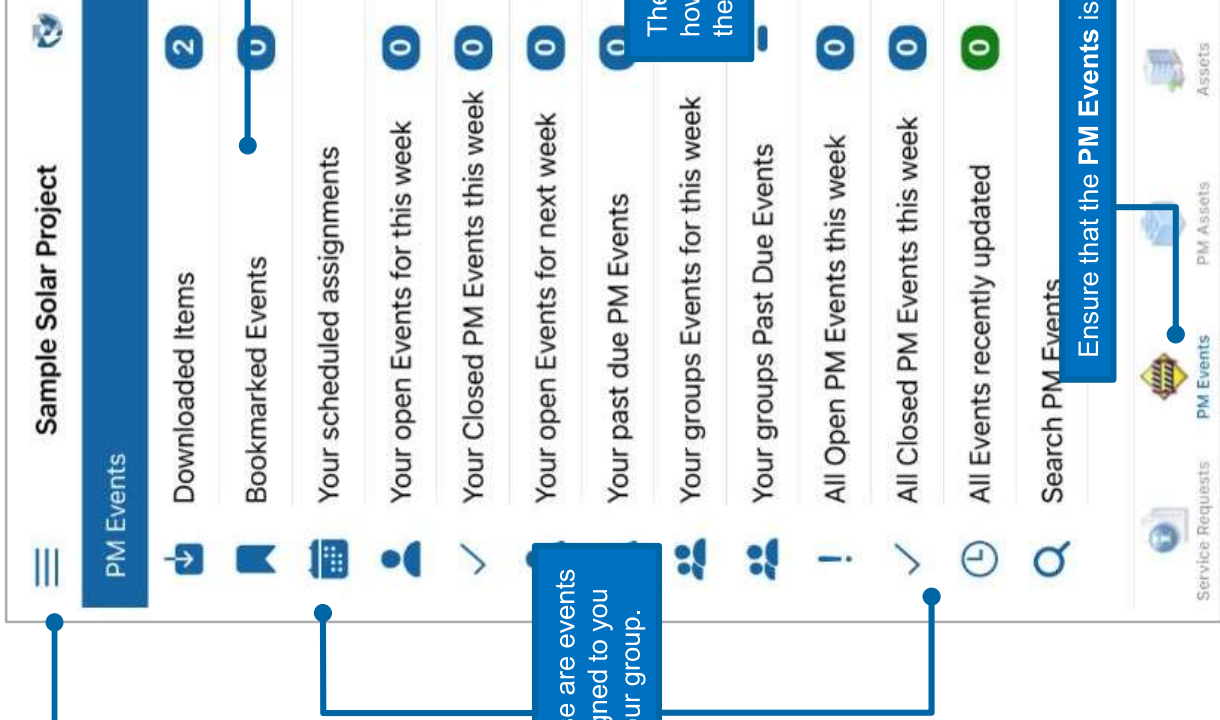
**PREVENTATIVE
MAINTENANCE**

PM Event Home Screen

Select the Menu icon to Log out, view Documents, Knowledge Base, Map, Change Password, and Switch Database (if you have access to multiple databases).



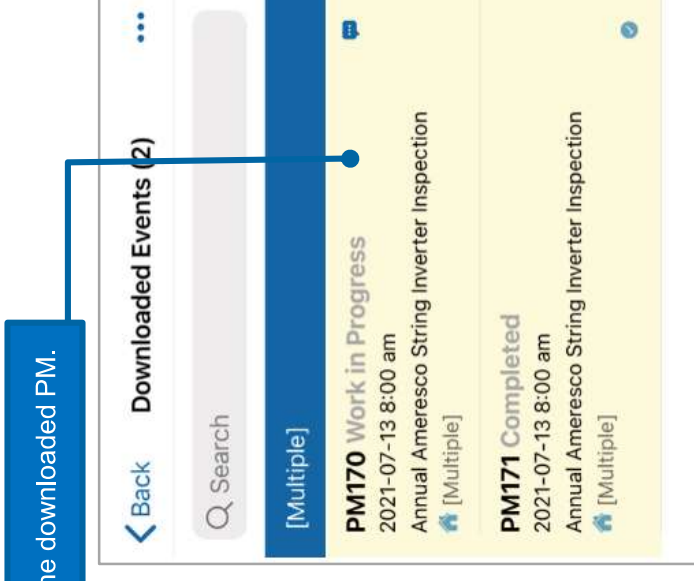
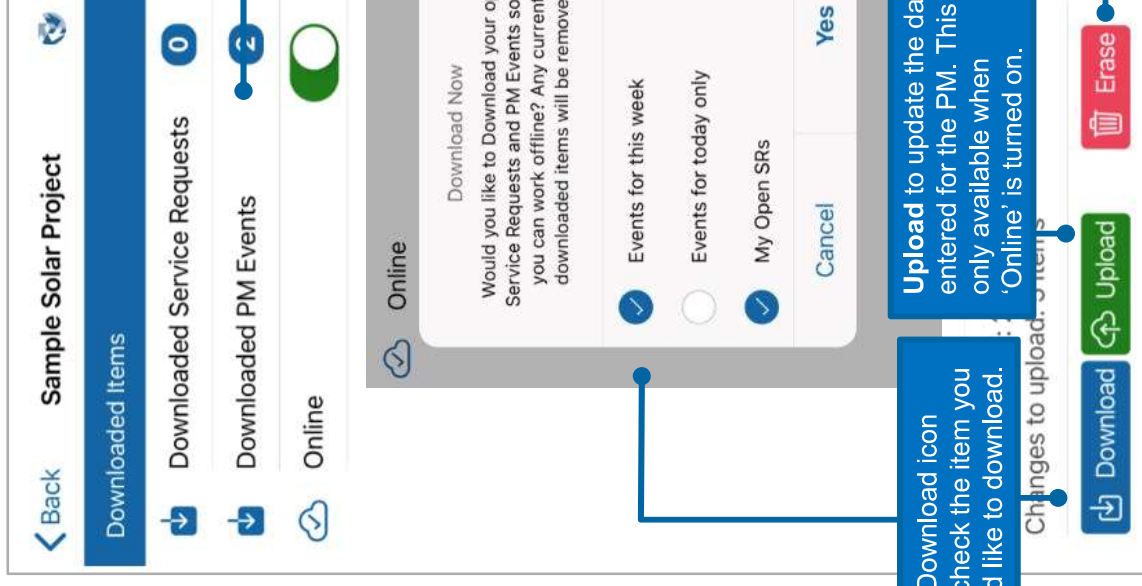
Turn on the **Use App in Dark Mode** to have a dark background while using the app. It can be found within *My Profile*.



Ensure that the **PM Events** is selected.



PM Event – Downloaded Items/Offline



Notes: Only assigned PM to yourself can be downloaded. Notes, Pictures, and Labor Hours are the only fields that can be updated Offline.



PM Event Page

Use the Back button to return to the home screen.

PM Procedure is placed below the Summary field. Tap the PM procedure to view the complete details. Complement your procedural information by directing users to specific Knowledge Base Articles or using the link when needed.

View existing Notes or add new Notes to the PM Event.

View, Take a Picture, or Upload a Picture from your photo library.

Use the Action Menu to quickly update some fields.

Check List shows the number of items there are. Tap to view the complete details.

If changes are made, Save button will appear.

Use the Action Menu to quickly update some fields.

Check List

PM 2150 Check List
Items Completed 0 of 4

1. OPERATE SAFETY RELIEF VALVE(S) MANUALLY. MAKE SURE IT IS FREE, CLEAR AND WORKING PROPERLY. RECORD AND REPORT TO MAINTENANCE ANY PROBLEM WITH A SAFETY RELIEF VALVE. (MANDATORY)

Completed?

Action Required?

Pictures (0)

Comments

2. TEST FLAME DETECTION DEVICES. (MANDATORY)

Completed?

Action Required?

PM 2150 Save

Summary (Task 30)

Monthly Hot Water Boiler Inspection

See KB: Monthly Plumbing Maintenance...

See Check List: 1. Operate safety reli...

Check List (4)

A - Hot Water Boilers (CA-BLR-001)

1 - Centennial Apartments

Location Parking Garage

Notes (0)

Previous Event 2019-09-01

Pictures/Attachments (1)

Pictures/Attachments from Task (0)

Library Camera

ACTION MENU

- Bookmark
- Assign to me
- Start Work Timer
- Set Work in Progress
- Create an SR
- Forward via Email
- View Activity
- Add a Note
- Add a Picture
- Add Labour Hrs
- Completed
- Triggers/Reminders



PM Event Page

< Back PM 151174

Status
 Scheduled

Pending

Scheduled Date
 2019-10-27 8:00 am

Date Completed

Assigned Group

Assigned To

Assisted By

Service Provider

Work Order

Estimated Time (hrs)
 1.00

Estimated Cost
 150.0000

Total Cost: \$150.00

This section is where the Status, Pending Status Reason scheduled, and completion date can be updated. The assignment areas shows all parties involved or assigned to complete the schedule event.

The PM Cost area will show **Estimated time by hours, Estimated Cost**, and the **Total Cost** of the PM Event. This is another place to add the Actual time spent completing the event or any other associated costs you wish to track.

Tapping on the Total Cost field will show the PM event costs or give the option to add new costs.

< Back Save

New Cost

Total Cost: \$40.00

Date 2017-10-25

Component Labour

Cost Type Test User

Provider

Code

Comments

Base Rate/Cost 40.00

Units Hour

Quantity 1

Cost 40.00

GST2

F&C Mark Up

Add Picture

View, Take a Picture, or Upload a Picture from your photo library.



Search PM Events

The screenshot shows the PM Events search interface. On the left, a list of event categories is displayed with counts:

- PM Events
- Bookmarked Events (0)
- Your open Events for this week (0)
- Your Closed PM Events this week (0)
- Your open Events for next week (1)
- Your past due PM Events (6)
- Your groups Events for this week (7)
- All Open PM Events this week (131)
- All Closed PM Events this week (0)
- Search PM Events

On the right, the 'Search Filters' section is shown with the following fields:

- By PM #
- Buildings
- Summary Contains
- Date Range: This week
- Status
- Assigned Group
- Assigned To
- Service Provider

Callouts provide the following instructions:

- Pointing to the search input field: "Type in the PM event number or the key words to start the search. Leave blank if no information is available."
- Pointing to the Search button: "Press the **Search** button once search criteria are entered. Use **Reset** button to clear the fields."
- Pointing to the drop-down arrows: "Tap the field where the drop-down arrows are to view the available options."
- Pointing to the Search PM Events link in the list: "Select the **Search PM Events** link from the home screen to list/search for old and new PM events."



PM Events

The screenshot shows the 'PM Events (131)' screen. At the top, there is a 'Back' button and a search bar. Below the search bar, a date filter '2017-10-22' is selected. The main content area displays a list of events, including 'PM103214 Scheduled' and 'PM98540 Scheduled'. Each event entry includes the event ID, date, time, and location. A 'Bookmark' icon is visible next to the first event. At the bottom, there are three action buttons: 'Assign To Me', 'Note', and 'Complete'. A 'Sort Options' menu is open, showing 'Newest First', 'Oldest First', and 'Last Updated'. A 'Note' icon is also visible on the right side of the screen.

Enter the PM event number to filter and quickly search for a PM event.

Click the **Sort Option** icon to sort the list according to your preference.

Swipe to the right to bookmark an event.

Swipe to the left to **Assign** it to yourself, **Add Notes**, and **Complete** the event.

This **Note** icon appears if a note has been added to the PM event.

Tap the PM Event anywhere to open and see the full details.



SERVICE REQUEST



Service Requests Home Screen – Support User

Select the Menu icon to Logout, view Documents, access the Map view and Change Password to list a few of the options shown there

Documents can be downloaded by tapping the downloaded icon. All downloaded files will be saved in your phone's app called Files or My Files.

These are requests assigned to you or your group.

These numbers indicate how many requests there are in each section.

Ensure that the Service Requests is selected.

Turn on the Use App in Dark Mode to have a dark background while using the app. It can be found within My Profile.

Bulletins are the messages posted by your database administrator. CONFIRM WITH ANITA

Service Requests

Downloaded Items 0

Bookmarked Requests 0

Your scheduled assignments 0

Open Requests assigned to you 0

Your Requests recently updated 0

Your Groups open Requests 0

Open Requests 35

All Requests recently updated 0

Requests you submitted 0

Search Service Requests

Create a new Service Request

Service Requests PM Events PM Assets Assets

Menu

Dashboard

Documents

Downloaded Documents

Knowledge Base

Map

My Profile

Change Password

Introduction

Switch Database

Logout

How To Guides Downloads

Project Planner Quick Start Guide.pdf 2016-03-16 11:43:39 Anita Wilson

Service Request Module Quick Start Guide 2020.pdf 2020-08-24 12:08:51 Anita Wilson

Department

Use App in Dark Mode

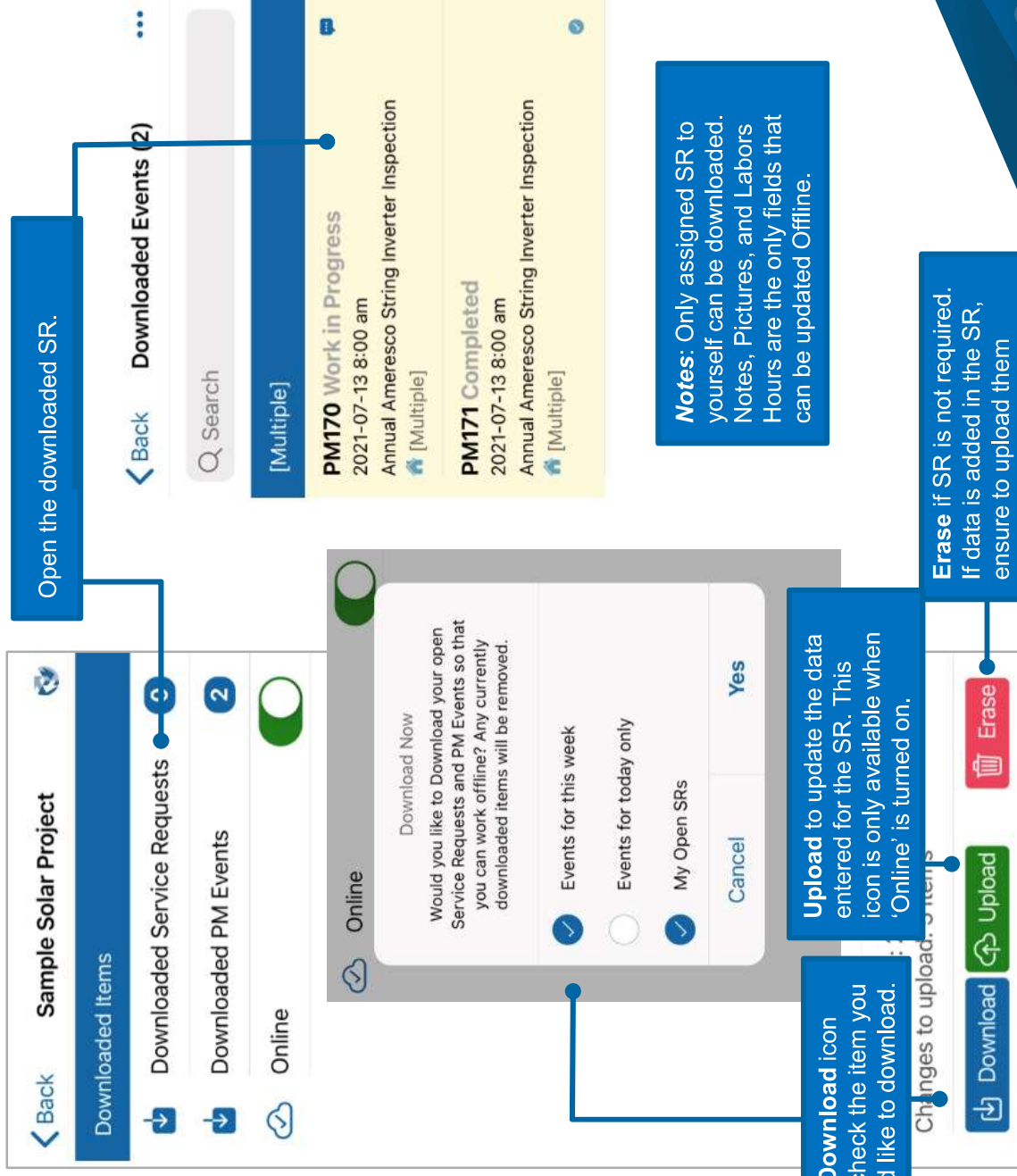
Time frame for Recent Requests 7 Days

Most Recent Notes First

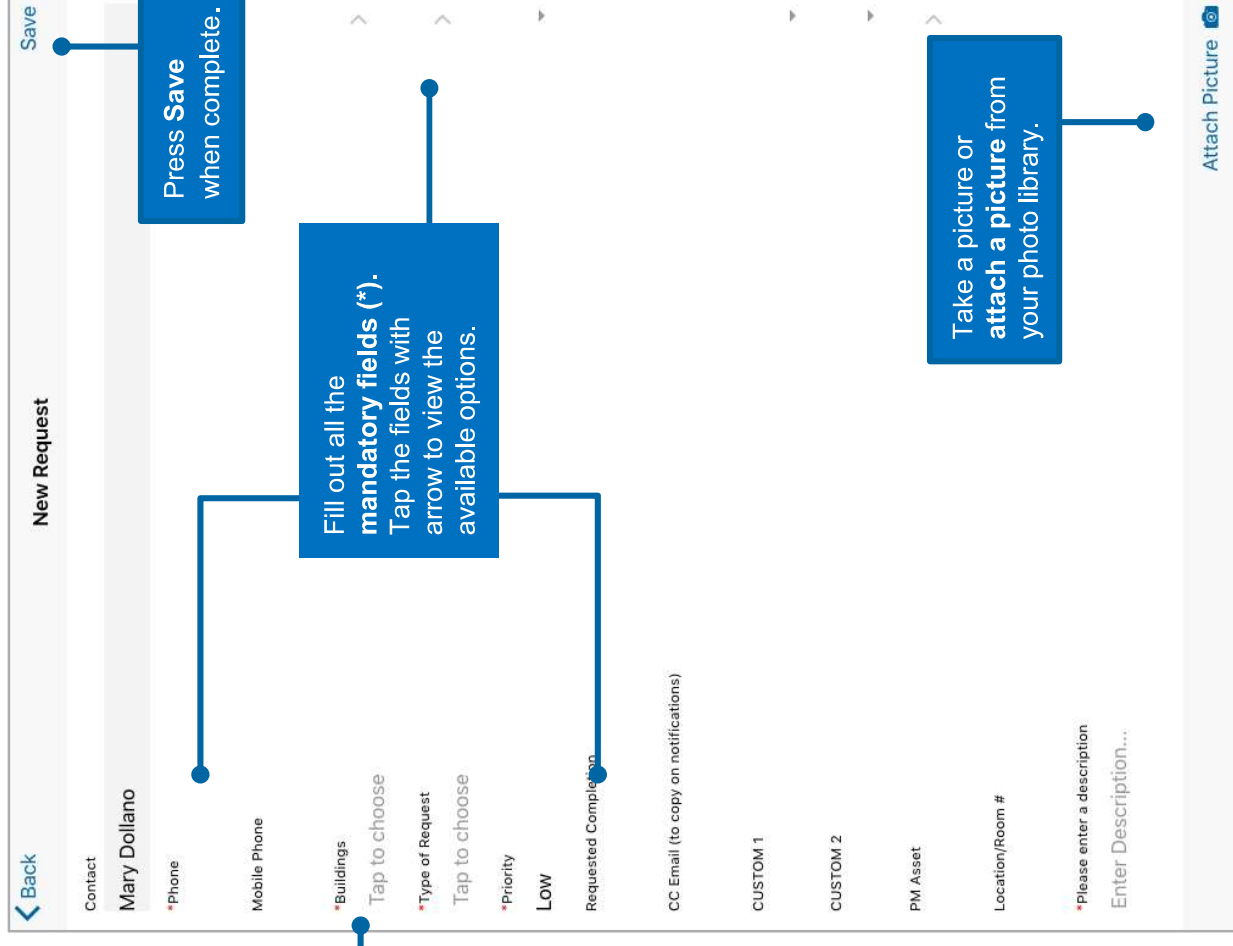
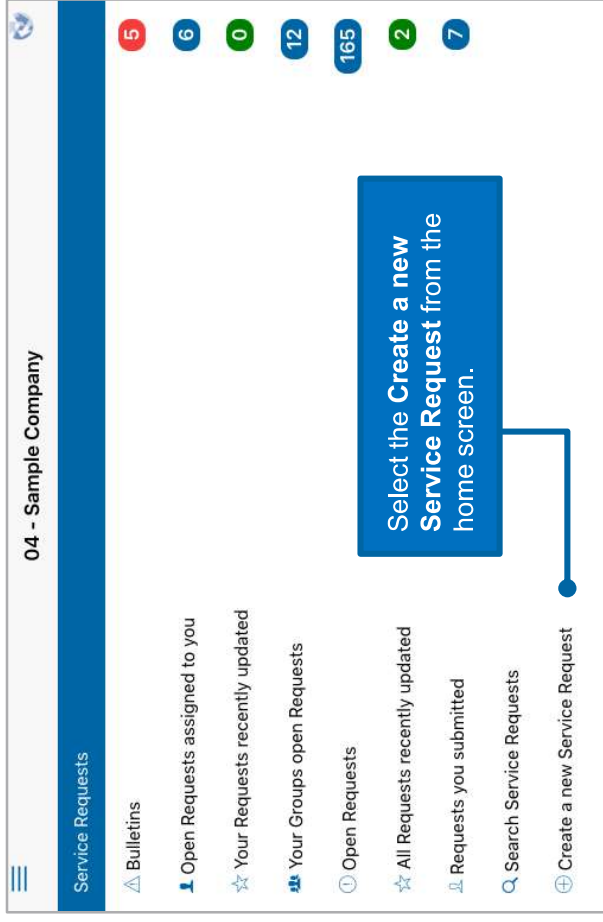
Email Notifications?



Service Requests – Downloaded Items/Offline



Create a Service Request – Support User



Barcode can also be scanned to easily find and attach the asset for the SR. Tap the Asset/Building/Facility field then tap the **Scan QR** on the top left corner of the screen.



Search Service Request – Support User

Use the **Back** button to return to the home screen.

Select the **Search Service Requests** from the home screen.

Press the **Search** button once search criteria are entered. Use **Reset** button to clear the field.

Type in the SR number or the key words to start the search. Leave blank if no information is available.

Tap the field where the drop-down arrow are to view the available options.



Service Requests – Support User

The screenshot shows the 'Requests (165)' screen in a mobile application. At the top, there is a 'Back' button and a search bar. Below the search bar, a list of requests is displayed, grouped by date. A 'Sort Options' menu is open, showing various sorting criteria. Callout boxes provide instructions on how to use these features.

Enter the SR number to filter and quickly search for a Service Request.

Click the Sort Option icon to sort the list according to your preference.

Swipe to the right to bookmark a SR.

Swipe to the left to Assign to yourself, Add Notes, and Close the request.

Date	Request ID	Status	Request Description	Assigned To
2017-10-13	SR001671	New	Ceilings - Water Stains	01 All Townhouses Steve Drew
2017-10-06	SR001670	New	Air Quality - Odour Detected - NATURAL GAS	250 Davenport Road - Site Scott Cripps
2017-09-20	SR001667	New	Discoloration	port Road Anita Wilson
2017-09-19	SR001666	New	This is a test	Community Centre Anita Wilson
2017-08-23	SR001665	Pending	VANDALISM - Interior	City Hall - Site Mary Dollano



Service Request – Support User

Use the Action Menu to quickly update some fields.

This section shows the information for the request given by the requestor. It will also show whether the SR submitted has specified check items to follow if enabled.

Tap For Support Staff Only to make the note only visible to support person.

Save
 For Support Staff Only

Summary
 SR001784
 Air Quality - Odour Detected - Moldy, Mildew, Damp Smell
 Location: The Mansion
 Requestor: Mary Dollano
 Check Items (1)
 Notes (1)
 Pictures/Attachments (0)
 PM Assets
 Priority: Low

This section is where the status, scheduled and date completed, can be updated.

Scrolling down the screen, you will see the assignment areas show all parties involved or assigned to the request.

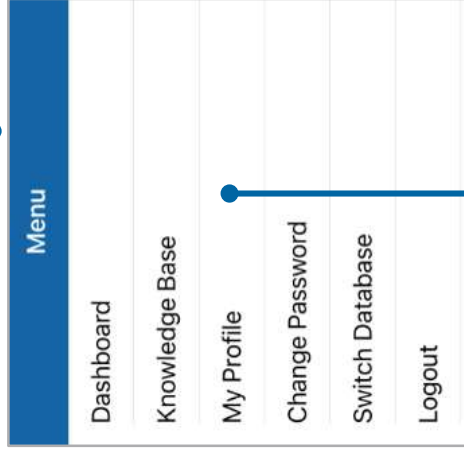
Status: New
 Pending
 MM - Minor Maintenance
 Created: 2019-09-30 08:29:42
 Requested Completion: 2019-09-30 8:28 am
 Scheduled Start Date
 Actual Start Date
 Date Completed

Tapping on the Cost field will take you to the history of the Service Request costs, if there is any, or add a new cost if necessary.

Assigned Group
 Assigned To
 Assisted By
 Service Provider
 CC Email
 Cost: \$0.00
 Work Order
 Purchase Order

Service Request – Client User

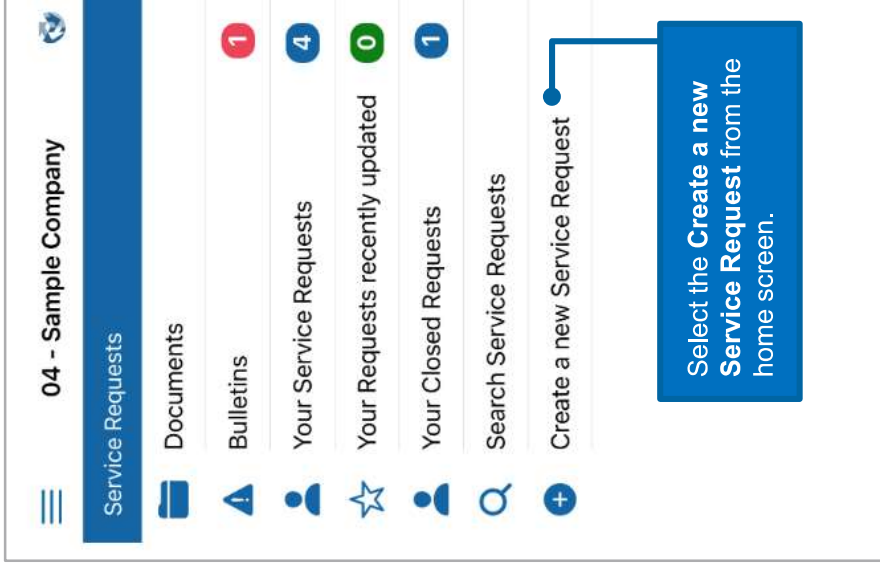
Select the Menu icon to Logout, view Documents, access the Map view and Change Password to list a few of the options shown there



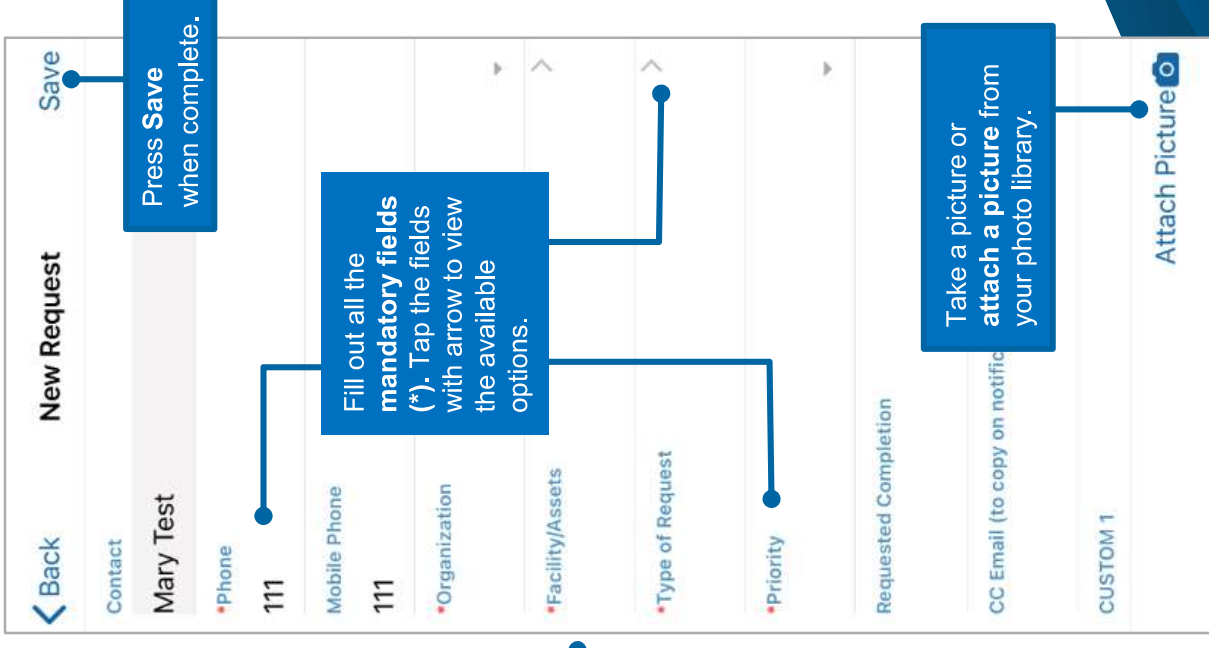
Turn on the Use App in Dark Mode to have a dark background while using the app. It can be found within My Profile.



Creating a Service Request – Client User



Barcode can be scanned to easily find and attach the asset to the SR. Tap the Asset/Building/Facility field then tap the **Scan QR** on the top left corner of the screen.



Search Service Request – Client User

Use the **Back** button to return to the home screen.



Press the **Search** button once search criteria are entered. Use **Reset** button to clear the field.

Type in the SR number or the key words to start the search. Leave blank if no information is available.

Tap the field where the drop-down arrow are to view the available options.



Service Request – Client User

Enter the SR number to filter and quickly search for a Service Request.

Click the **Sort Option** icon to sort the list according to your preference.

Use the **Action Menu** to quickly update some fields.

Swipe to the right to bookmark a SR.

Tapping the SR will open and view the full SR Detail. **Notes** and **Pictures** can also be added here by tapping the fields.

Swipe to the left to add a **Note** and communicate with the support person.

The screenshot shows a list of service requests with columns for 'Requests (4)', 'Sort Options', and 'Status'. A detailed view of a request (SR001882) is shown below, including fields for 'Summary', 'Floor', 'Location/Room', 'Support Person', and 'Status'. The detailed view also includes an 'Action Menu' with options like 'Bookmark', 'Forward via Email', 'Add a Note', and 'Add a Picture'.

PM ASSETS



PM Assets Home Screen

Select the Menu icon to **Logout**, view **Documents**, **Change Password**, and **Switch Database** (if you have access to multiple database).

Menu

- Dashboard
- Documents
- Downloaded Documents
- Knowledge Base
- Map
- My Profile
- Change Password
- Introduction
- Switch Database
- Logout

Turn on the **Use App in Dark Mode** to have a dark background while using the app. It can be found within *My Profile*.

Profile Save

Email
mtiu@ameresco.com

First Name
Mary

Last Name
Tiu

Phone

Mobile Phone

Asset

Department

Use App in Dark Mode

Time frame for Recent Requests
7 Days

Most Recent Notes First

Email Notifications?

04 - Sample Company

PM Assets

- Bookmarked Assets
- Search PM Assets
- Scan Bar/QR Code
- Total PM Assets
- Recently Updated
- Create a new Asset

Service Requests PM Events PM Assets Buildings

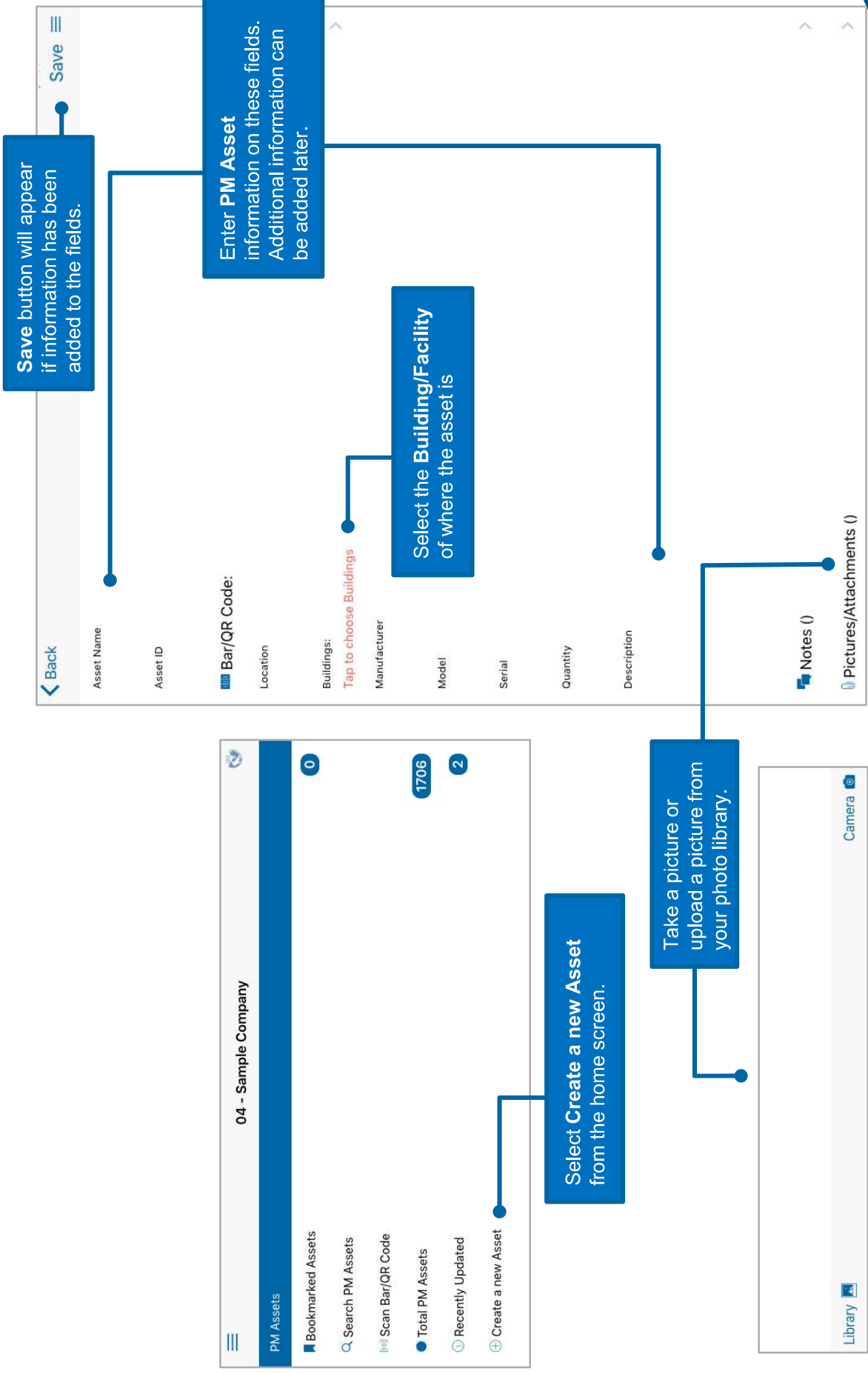
Any Assets that have been bookmarked will be listed here.

These numbers indicate how many PM Assets there are in each section.

Ensure that the PM Assets is selected.



Creating PM Assets



Search PM Assets

Select the **Search PM Assets** from the home screen.

Use the **Scan Bar/QR Code** to look up for PM Assets with barcode assigned on it.

Press the **Search** button once search criteria are entered. Use **Reset** button to clear the field.

Type in the Asset ID or the key words to start the search. Tap the Building/Facility field to list out all assets. Leave blank if no information is available.

Click **Scan Barcode** to begin and place the barcode inside the green box aligning the red line. When find, it will open the Asset page.

Scan a Barcode/QRCode to quickly lookup an PM Asset.
(To first assign a Barcode to an PM Asset Component, open the desired PM Asset tap the Barcode field and scan its code.)

Search Filters

Asset ID
Asset Name
Boiler
Description Contains
Buildings

Reset Search

Back

PM Assets

04 - Sample Company

Bookmarked Assets 0

Search PM Assets

Scan Bar/QR Code

Total PM Assets 1706

Recently Updated 2

Create a new Asset

Barcode

Scan Barcode



PM Assets Page

The screenshot shows the PM Assets page with the following callouts:

- Use the Back button to return to the previous page.** (points to the Back button)
- Use the Search field to filter down your searching.** (points to the Search field)
- Click the Sort Option icon to sort the list according to your preference.** (points to the Sort Options icon)
- A meter indicates that there is a meter where meter readings can be displayed and captured.** (points to the meter icon)
- A clip indicates that there is a file or a picture attached to the asset.** (points to the clip icon)
- This Note icon appears if a note has been added to the asset.** (points to the note icon)

The page content includes a header with a Back button and a title "PM Assets (5)". Below the header is a search bar and a table of assets. The table has columns for AssetName, Buildings, Category, Location, and Last Updated. The assets listed are:

AssetName	Buildings	Category	Location	Last Updated
Boiler				
Boiler 104567 -BLR-001	M1		D3022 - Hot Water Boilers Champlain Place	
Boiler 104567 -BLR-002	M1		D3022 - Hot Water Boilers Champlain Place	
Boiler B-1	Boiler Room		E - Equipment And Furnishings 250 Davenport Road	
Hot Water Boiler - Test			D3022 - Hot Water Boilers Beaches Recreation Centre - Building	
Hot Water Boilers			D3022 - Hot Water Boilers Police Station	



PM Assets Page

PM Asset information is stated in this page. Scroll down to view all the available fields. Additional information can be added on the existing assets.

The screenshot displays the PM Assets page for an asset named "Test". The page includes a "Back" button, a "Test" title, and a list of fields: Asset Name (Test), Asset ID, Bar/QR Code, Location, Buildings (Unit - 5405), Manufacturer, Model, Serial, Quantity, and Description. At the bottom, there are sections for Notes (0), Pictures/Attachments (0), and Status (Active). An "ACTION MENU" is open, listing options: Bookmark, Add a Note, Add a Picture, View Activity, Create an SR, Show Recent SR's, Show Recent PM's, Next Scheduled PM's, Delete Asset, and Duplicate. A blue callout box points to the Action Menu with the text: "Use the Action Menu to quickly update some fields."



**FACILITY /
ASSET CLASS**

Facility/Building/Asset Home Screen

Menu

- Dashboard
- Documents
- Knowledge Base
- Map
- My Profile
- Change Password
- Introduction
- Switch Database
- Logout

Profile Save

Email: mtiu@ameresco.com

First Name: Mary

Last Name: Tiu

Phone: _____

Mobile Phone: _____

Asset: _____

Department: _____

Use App in Dark Mode:

Time frame for Recent Requests: 7 Days

Most Recent Notes First:

Email Notifications:

04 - Sample Company

Facility/Assets

Bookmarked Facility/Assets: 0

Search Facility/Assets

Recently Updated: 0

Create a New Facility/Assets

Bar/QR Code

Service Requests PM Events PM Assets Facility/Assets

These numbers indicate how many facilities there are in each section.

Any Facility or Building that has been bookmarked will be listed here.

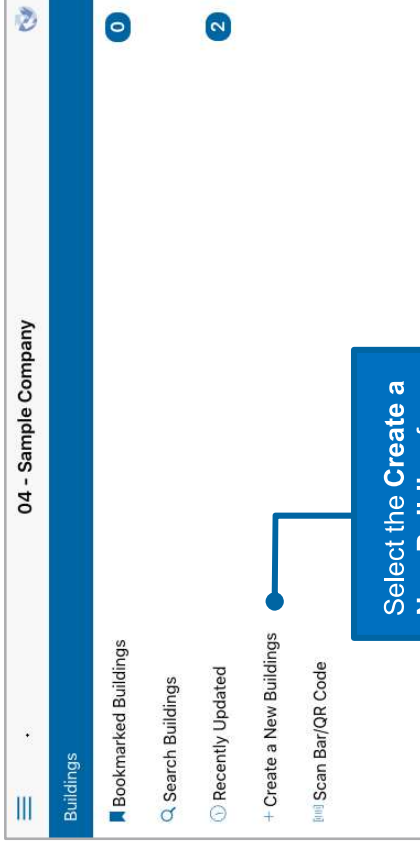
Select the Menu icon to Logout, view Documents, Change Password, and Switch Database (if you have access to multiple database).

Turn on the Use App in Dark Mode to have a dark background while using the app. It can be found within My Profile.

Ensure that the Facility/Building is selected.

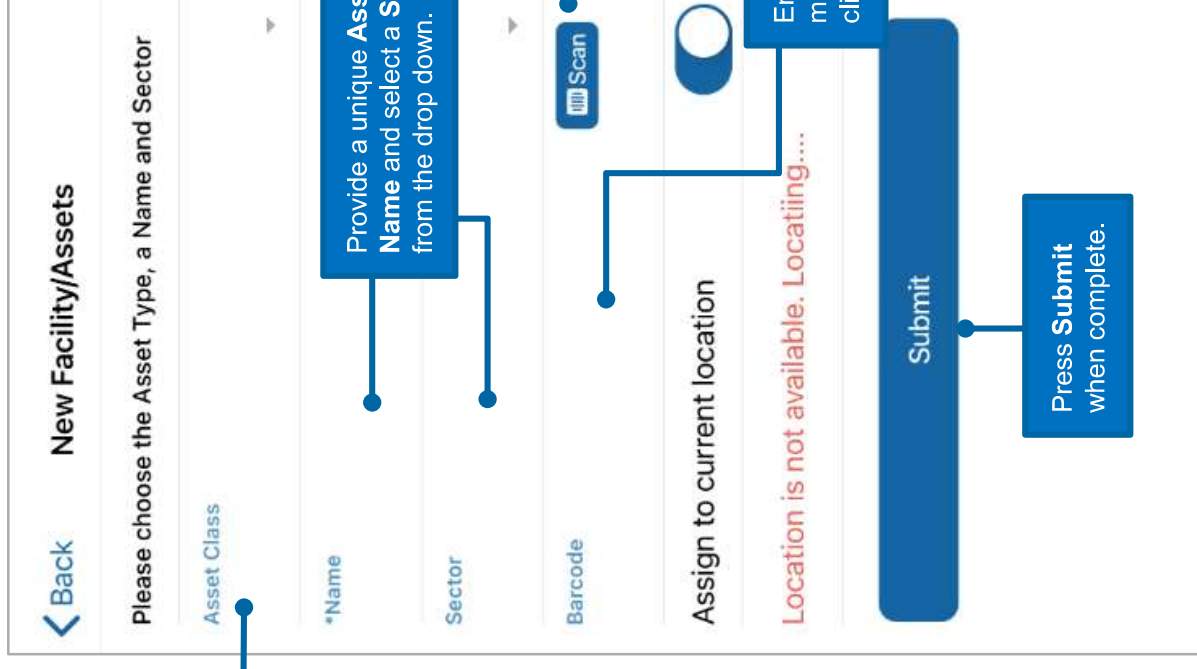
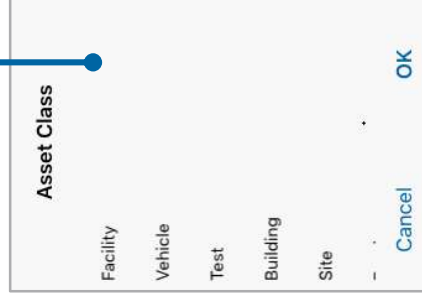


Create a Facility/Building (Asset Class)



Select the **Create a New Building** from the home screen.

Select the type of **Asset Class** by tapping the asset class field. The list of asset class is configured by the Ameresco staff.



Provide a unique **Asset Name** and select a **Sector** from the drop down.

Assign to current location

Enter the **barcode** manually or scan it by clicking the Scan icon.

Press **Submit** when complete.



Search Facility/Building (Asset Class)

Use the Search field to filter down your searching.

Select the Search Facility or Building from the home screen.

Tap this field to change the current view of the below listing.

Tap the facility to view the full facility page.

Current View

Facility	Meter Type, Development	Department	Ward
01 All Townhouses			
250 Davenport Road			
250 Davenport Road - Site			
445 Glengarry			
5402-5404 Reginald St.			
↳ child items for 5402-5404 Reginald St.			
5405-5417 Reginald St.			
↳ child items for 5405-5417 Reginald St.			
5406-5418 Reginald St.			
5421-5423 Reginald St.			
5425-5427 Reginald St.			
5428 Reginald St.			
5429-5431 Reginald St.			
5430-5438 Reginald St.			
5433-5435 Reginald St.			
5437 Reginald St.			



Facility/Building Page (Asset Class)

The screenshot shows a mobile application interface for a facility page. At the top, there is a 'Buildings' header with a menu icon. Below it is an 'Action Menu' with options: 'Bookmark', 'View Activity', 'Create SR', 'Scan Bar/QR Code', and 'Pin to current location'. A callout box explains: 'Use the **Action Menu** to bookmark the facility, create an SR, or add or change the facility barcode.' Below the menu is a photo of a building. A callout box points to this photo: 'See the Facility name and its address shown below picture.' Below the photo is the facility name '445 Glengarry' and address '445 Glengarry Ave, Windsor, ON N9A 1R1'. A callout box explains: 'Open the **Map** to see where the facility is located. The location of the pin is based on the address entered in the facility information.' Below the address is a 'Map' button. A callout box explains: 'View, Take a Photo, or Upload a Photo from your library.' Below the map is a list of metrics: 'Pictures/Attachments' (14), 'Open Service Requests' (21), 'PM Events (this week)' (1), and 'PM Events (+/- 1 Month)' (15). A callout box explains: 'These numbers indicate how much items there are in each links. Tap the field to view the complete listing.' Below the metrics is a 'General Details' section with expandable fields: 'Description' (84 one bedroom units, 48 two bedroom units), 'AssetNetwork', 'FacilityFunction', and 'Sector'. A callout box explains: 'Scroll down to view all the rest of the facility/building information.'

Use the **Action Menu** to bookmark the facility, create an SR, or add or change the facility barcode.

See the Facility name and its address shown below picture.

Open the **Map** to see where the facility is located. The location of the pin is based on the address entered in the facility information.

View, Take a Photo, or Upload a Photo from your library.

These numbers indicate how much items there are in each links. Tap the field to view the complete listing.

Scroll down to view all the rest of the facility/building information.





Thank You!

AssetPlanner™ Support Line:
1-855-583-2627