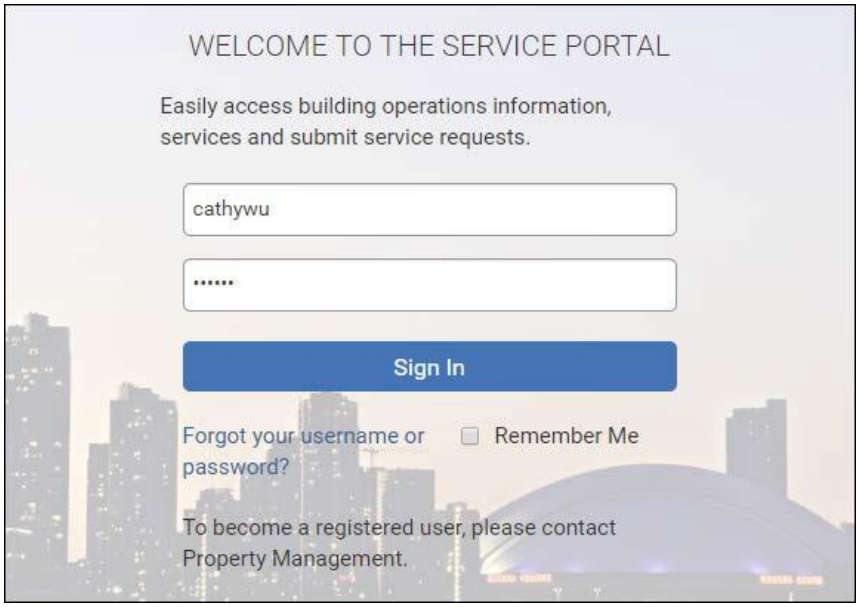
Appendix A
Online Tenant Request Instructions

Logging In

If your account's contact information includes an email address, you can use the **Forgot your username or password** link to recover your login information, as shown in the image below the **Sign In** button.

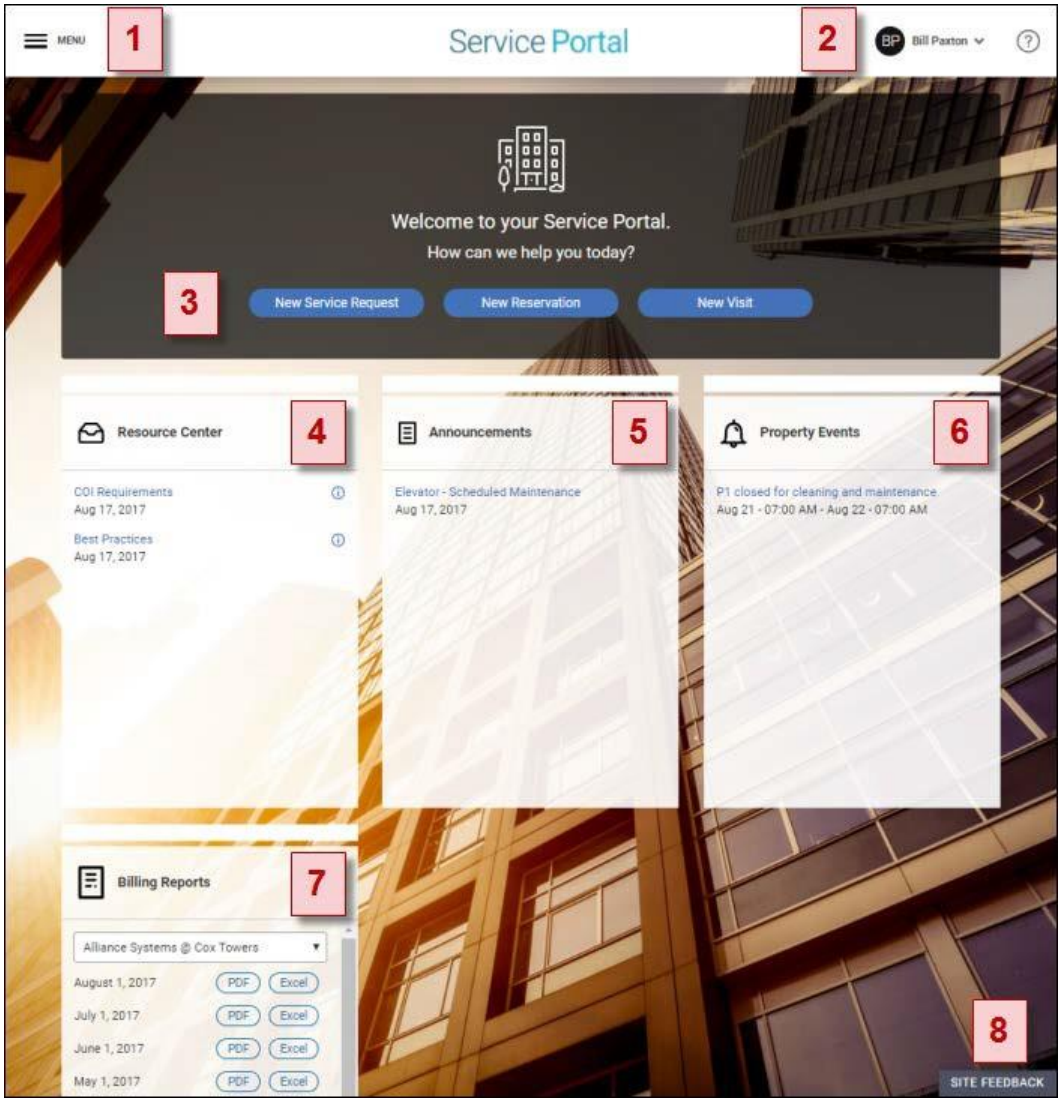
1. Open a web browser and enter the web address to your Service Portal, as provided by your Property Management company. The Login screen is displayed.
2. Click the **Username** field and enter your user name.
3. Click the **Password** field and enter your password.
4. If you would like the site to remember your username and password, place a checkmark beside **Remember Me**.
5. Click **Sign In**.



The Home Page

Depending on how your Service Portal has been configured, as well as your level of access, some features described below may not be available, or their exact positioning or appearance on the page may be different than shown below.

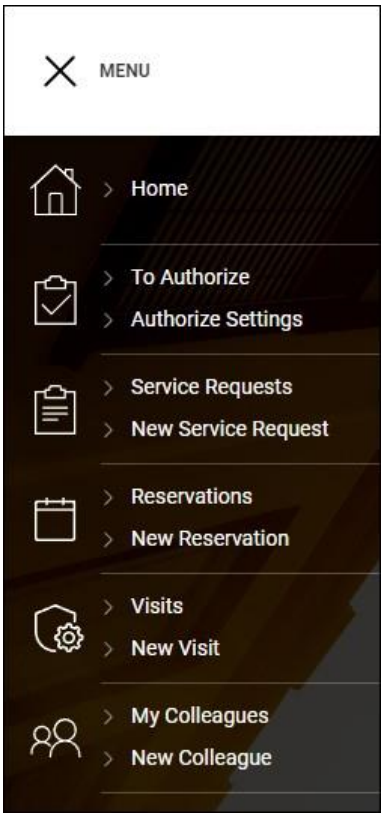
A variety of features and functions can be made available on the Service Portal's home page, which is displayed by default after logging in. A description of each numbered section can be found below.



1. **Navigation Menu:** click the menu button (MENU) to open the Navigation Menu and access the various features available in your Service Portal. Depending on how your Service Portal has been configured, as well as your level of access, some features described below may not be available, or their exact positioning in the menu may be different.

- At higher screen resolutions (such as a high-resolution tablet, or desktop computer with a full-screen browser window) the menu will stay open as you navigate between screens unless you click the **close** button (MENU).

- At lower screen resolutions where the menu overlaps with other elements on the screen, the menu will automatically close after a selection is made.



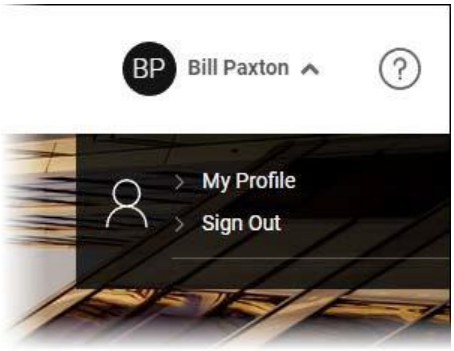
The following options are available in the menu. Please note that depending on the services enabled in your Service Portal and your level of access, some options shown above may not be displayed.

- **Home:** displays this page.
- **To Authorize:** if are a tenant authorizer, click this option to view a list of items awaiting authorization.
- **Authorize Settings:** if you are a tenant authorizer, use this option to set up automatic authorization for specific request types.
- **Service Requests:** view the status of your Service Requests.
- **New Service Request**: create a new Service Request

- **Reservations:** review the status of your reservations (such as meeting rooms) in a calendar or as a list. Depending on your level of access, you may also be able to see reservations created by your colleagues.
- **New Reservation:** reserve one of your building's amenities.
- **Visits:** review a list of visitors that have been entered into the Visitor Security system. Depending on your level of access, you may also be able to see visitors entered by your colleagues.

6. **New Visit:** Enter a new visit to keep Property Management informed about your visitors, allowing security to check them in smoothly and efficiently.
7. **My Colleagues:** manage your colleague's user settings. This option is only available if you are a Tenant Administrator.
8. **New Colleague:** Create new user accounts for your colleagues. This option is only available if you are a Tenant Administrator.

2. **User Menu:** this section displays your name. Clicking on your name opens a menu that provides the following options:



- **My Profile**: view and edit your user settings. See Changing Your Profile for additional information.
- **Log Out:** log out of the Service Portal.

3. **Quick Links:** depending on the services available in your Service Portal, up to three quick link buttons are displayed here, allowing you to quickly access the following features without using the Navigation Menu:
   - **New Service Request:** enter a new Service Request.
   - **New Reservation:** create a new Resource Reservation, such as a meeting room, freight elevator, or other building amenity.
   - **New Visit:** enter the details for an expected visitor to your building.

4. **Resource Center:** the Resource Center card displays a collection of documents that your property manager has made available to tenants, such as Certificate of Insurance (COI) Compliance and Tenant Handbooks outlining general policies and procedures. Click on a document name to view it.
5. **Announcements:** from time to time, your property management office may issue announcements concerning building-related events or other important information. These announcements may require an immediate action or response than notices that appear in the **Property Events** card (described below). You can click on the links to display the full details of the announcement.
6. **Property Events:** this card displays scheduled property events that may span multiple days, such as construction activities that temporarily restrict building access. Clicking on an event listed here will display additional details.
7. **Billing Reports:** The billing reports card provides links to view monthly summaries of billable tenant requests. These reports are generally available as both PDF and Microsoft Excel files (in some cases they may only be available in PDF format). Tenant Administrators can grant access to this feature to coworkers; see Modifying Colleagues for more information.

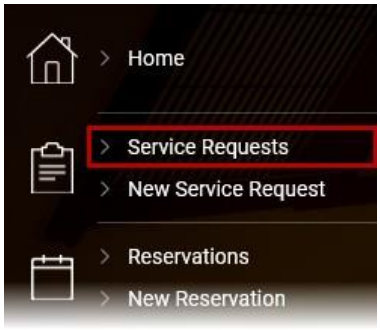
Contacts who can access all properties in a tenant group can use a drop-down list to select which tenant's billing reports to display.

8. **Site Feedback:** if you encounter a problem while using the Service Portal, such as a feature or function that does not seem to be working correctly, you can report the issue here.

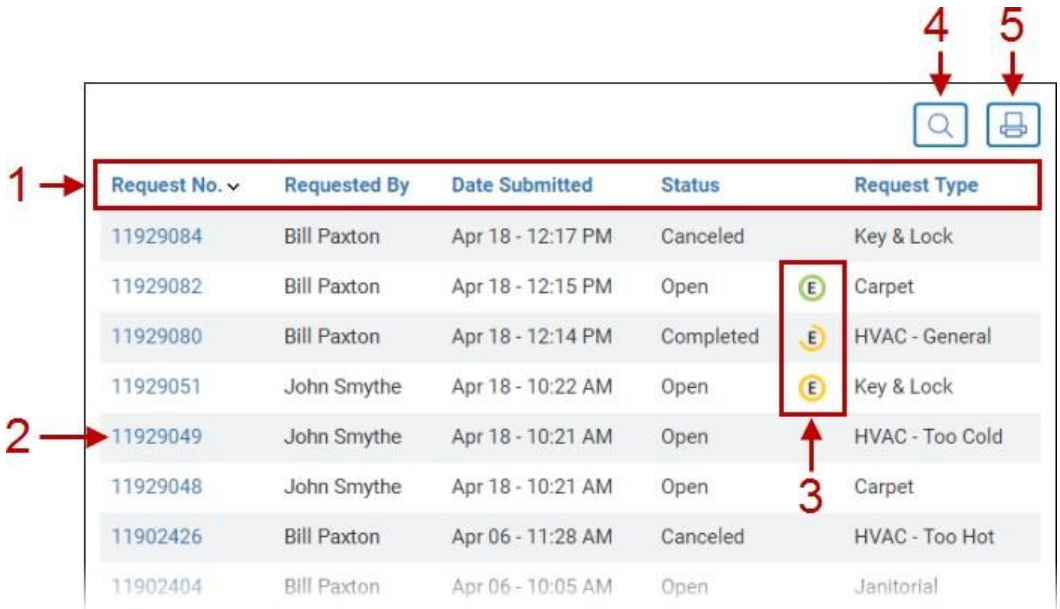
Tenant Service Requests

The Service Requests List

The Service Requests list allows you to view and search for service requests that have been made. A history section on each request's details screen tracks status updates to them as they occur. To access the list, click **Service Requests** in the navigation bar to the left.



By default, the system displays requests submitted in the last 30 days, of any request type and status. An overview of the list and its functions are provided below.

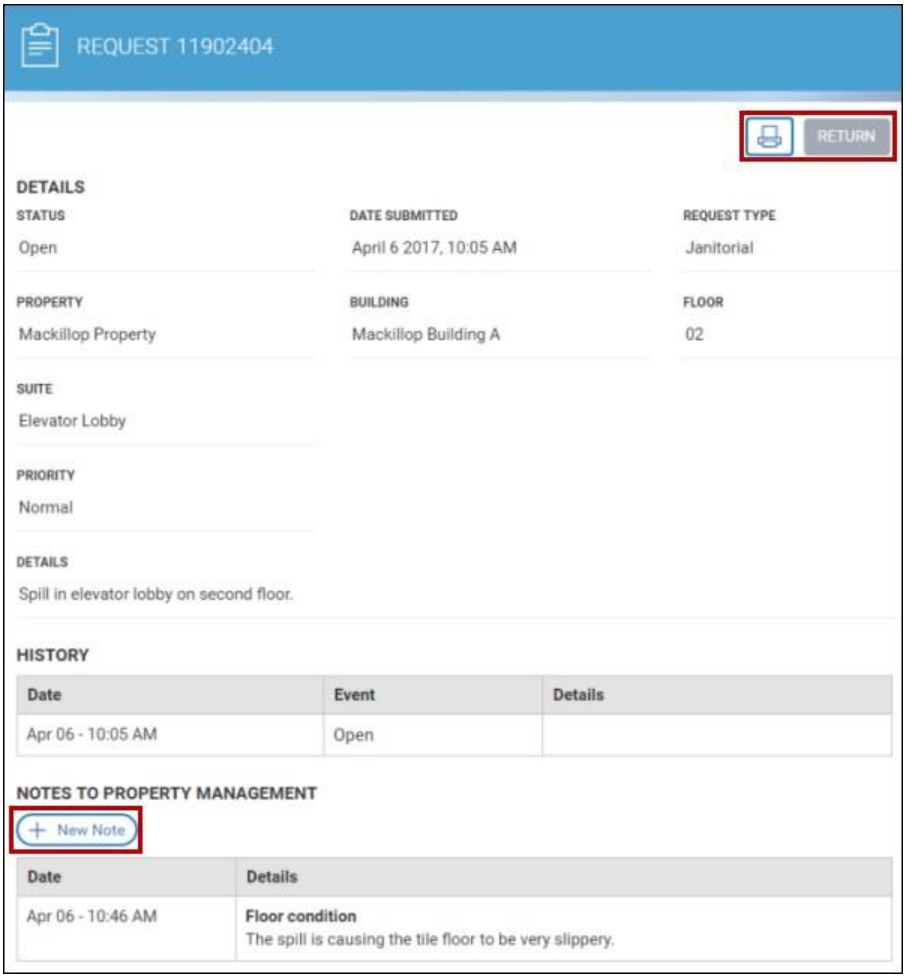


1. You can sort the list by clicking on the column headings (Request Number, Requested By, Date Submitted, Status, and Request Type).

- If Property Management uses the Service Rating feature, an additional **Ratings** column shows ratings for completed work orders. For additional information on how the Service Rating system works, please see the Service Rating topic.

2. Click on a request number or double-click on the row to view a Service Request's details.

   - If the Cancel Service Request feature has been enabled, you can cancel requests in specific circumstances. See the Cancel Service Request topic for details.
   - You can add a note to Property Management concerning the service request from the Details Screen. See Sending a Note for additional information.
   - Click the **Print** icon) to print a copy of the Service Request's details.
   - Click **Return** to go back to the previous screen you were viewing.



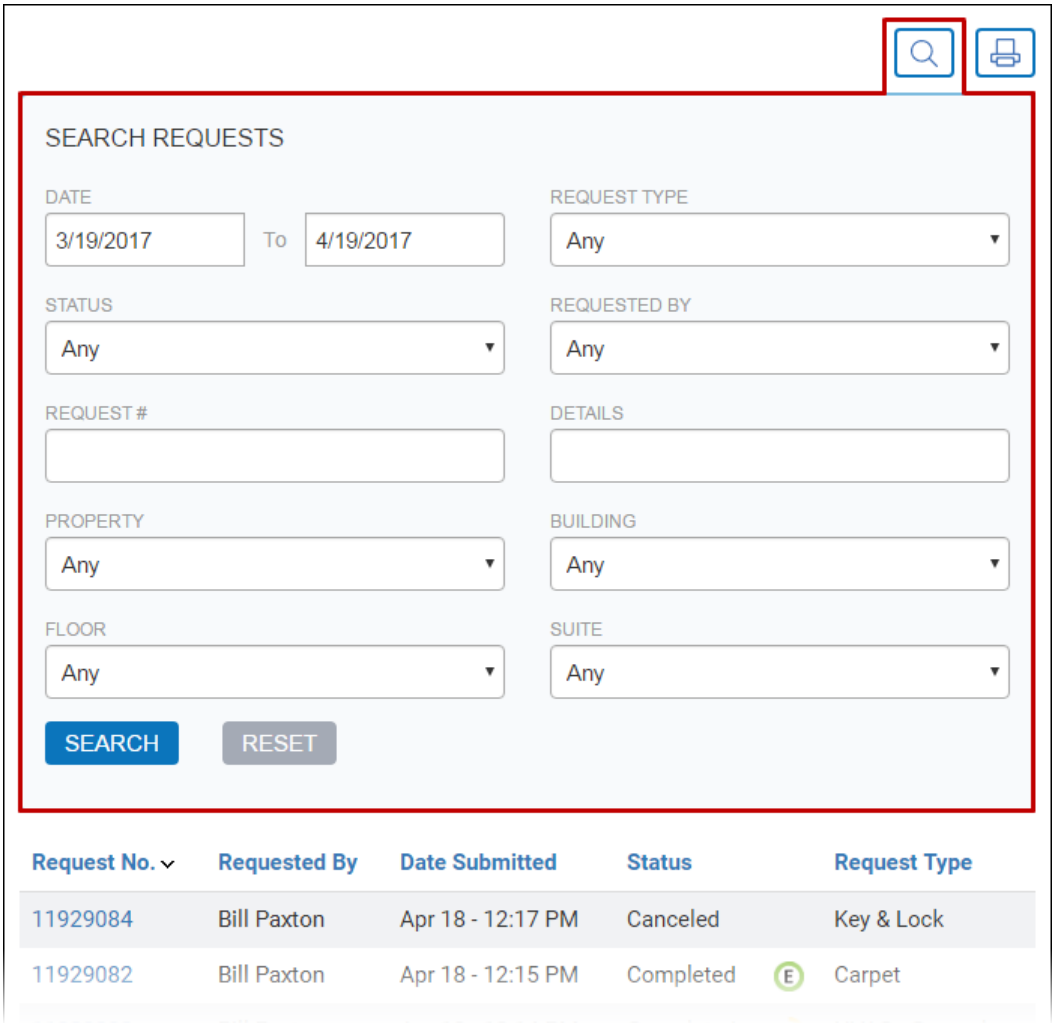
3. Some service request types may have fees associated with them, collectively referred to as **billable services**. If the Estimates feature has been enabled by Property Management, a cost-estimate can be requested from Property Management when entering a Service Request. Once the estimate is received, it can then be rejected or approved from the Request Details screen; rejected estimates will cancel the Service Request.

Requests with estimates associated with them indicate the status of these requests using color coded icons:

- E indicates that an estimate request has been sent and is **awaiting a response** from Property Management.
- E means that an estimate has been provided by Property Management and is **pending approval** (you can respond by approving or rejecting the estimate).
- E denotes that the estimate was **approved**.

For additional details using estimates, see About Estimates and associated topics.

4. Clicking the **Search** icon) displays additional options for filtering the list, as detailed below.



The following filtering options are available:

- **Date:** you can change the date range by clicking on the date fields and selecting a new start and end date.
- **Request Type:** use the dropdown list to select a specific request type (e.g. Elevator, Electrical, Key & Lock, etc).
- **Status:** you can view requests with any status (default), Open, In Progress, Delayed, Declined, Canceled, and Completed.
- **Requested By:** if you have permission to view requests made by your colleagues, you can select a specific colleague with this dropdown list.
- **Request #:** If you know the request number, you can view it by entering the number here.
- **Details:** you can enter key words to search for requests that contain these words in their
- **Details** field.
- **Property:** if your company has offices in multiple properties, you can select the property using this dropdown.
- **Building:** if your company has offices in multiple buildings, you can select the building using this dropdown.
- Floor
- Suite

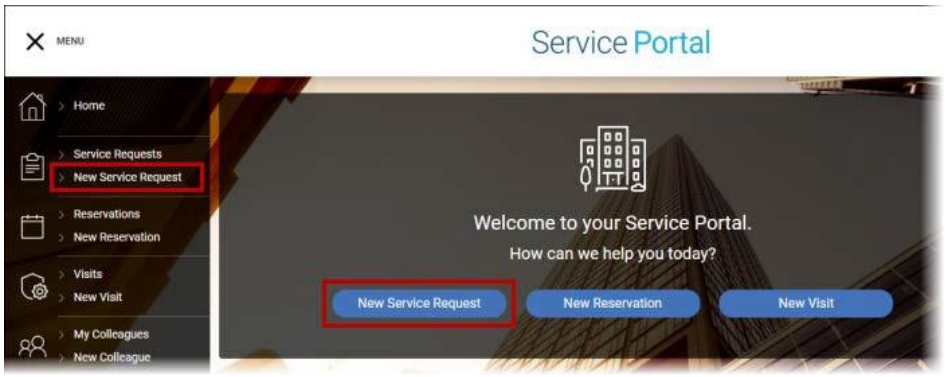
Click **Search** to apply your filter options.

5. You can also click the **Print** icon) to print the details of each Service Request that is currently displayed.

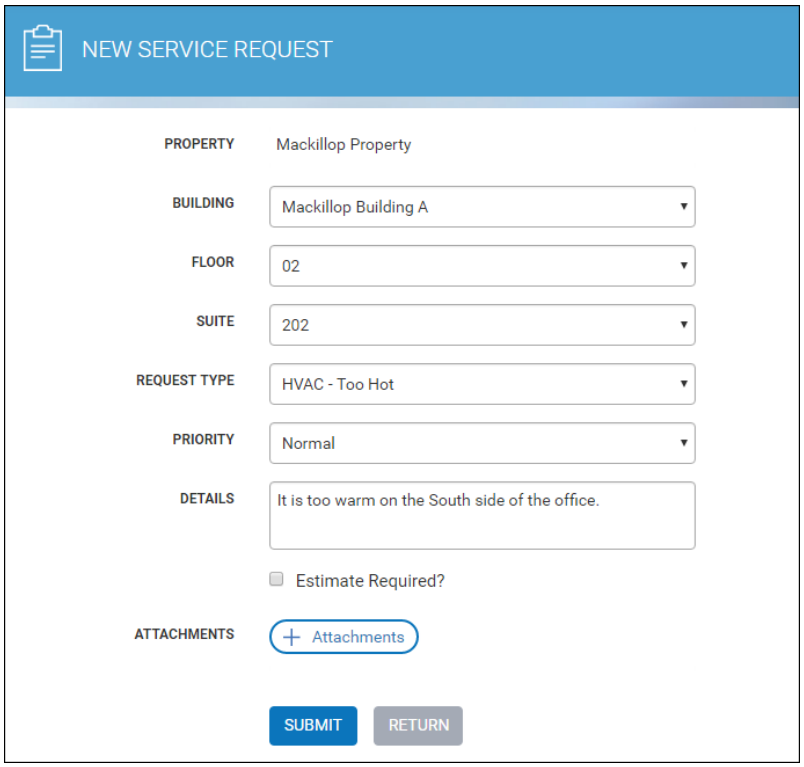
Making a Service Request

If you need to cancel a request and the Cancel Service Request feature is enabled, then under specific circumstances a service request can be canceled using the Service Portal. For additional details, see the Cancel Service Request topic.

Requests are submitted to report issues that require attention from your Property Management Company. To create a new request, Click **New Service Request** from the navigation menu (MENU), or click the **New Service Request** quick link from the Home page. This will open the New Service Request screen.



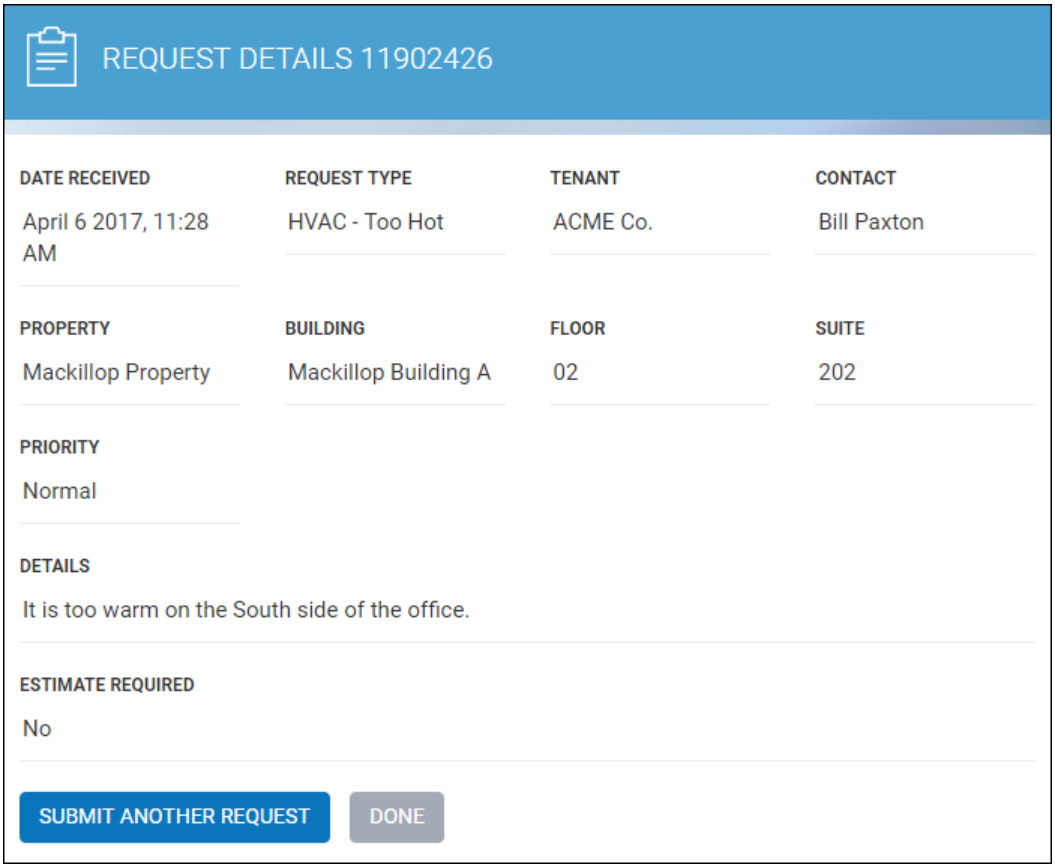
From the New Service Request page, follow the steps outlined below to submit a new request.



1. If you have offices in more than one building and your tenancy has been set up to allow you to create requests for more than one property or building, the following additional fields may need to be filled in:
    - If your tenancy spans multiple properties, then the **Property** field will be displayed as a dropdown list. Select the property for the service request.
    - If your tenancy is in more than one building on the same property, then the **Building** field will be displayed as a dropdown list. Select the building for the service request.
2. Use the **Floor** and **Suite** drop-down lists to select a floor and suite.
3. Click the **Request Type** field and select a request type from the drop-down menu.
4. If your Property Management Company uses priority levels for requests (as shown above), use the **Priority** drop-down menu to select a priority.
5. Your Property Management Company may also require additional custom fields to be filled in. Enter the appropriate information in any additional fields which may be present.
6. Provide additional information concerning the request in the **Details** field.
7. Depending on your how your service portal is configured, an **Estimate Required** checkbox may be displayed. Indicate if a cost-estimate is required using the checkbox provided.
8. If there are any files you would like to attach to the request, such as pictures, PDFs, or other documentation which concerns the request, click the **Attachments** button and select the file you would like to attach.
    - You can attach a maximum of 3 files.
    - The combined size of all files attached cannot exceed 10MB.
    - After submitting your request, you cannot add, remove, or otherwise modify the attachments.
9. Click **Submit**. Your request is submitted, and the Request Confirmation screen is displayed.

If your property uses the Authorization feature, your request may require authorization before it can be processed. The system will display a message informing you that authorization is required.

10. The request's details are displayed.



- If you would like to enter another service request, click **Submit Another Request**.
- Click **Done** to return to the Service Requests list.

Cancel Service Request

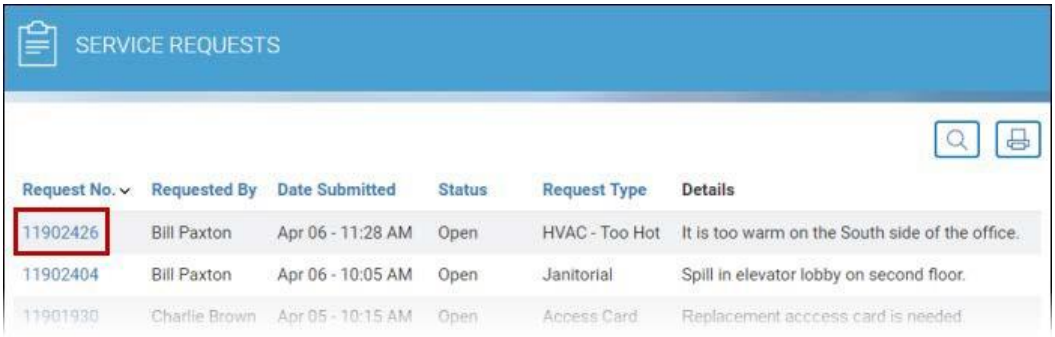
If this feature is not enabled and you would like to cancel a request, you can request a cancellation by contacting your Property Management office.

If enabled by Property Management, the Cancel Service Request feature allows tenants to cancel service requests under specific circumstances:

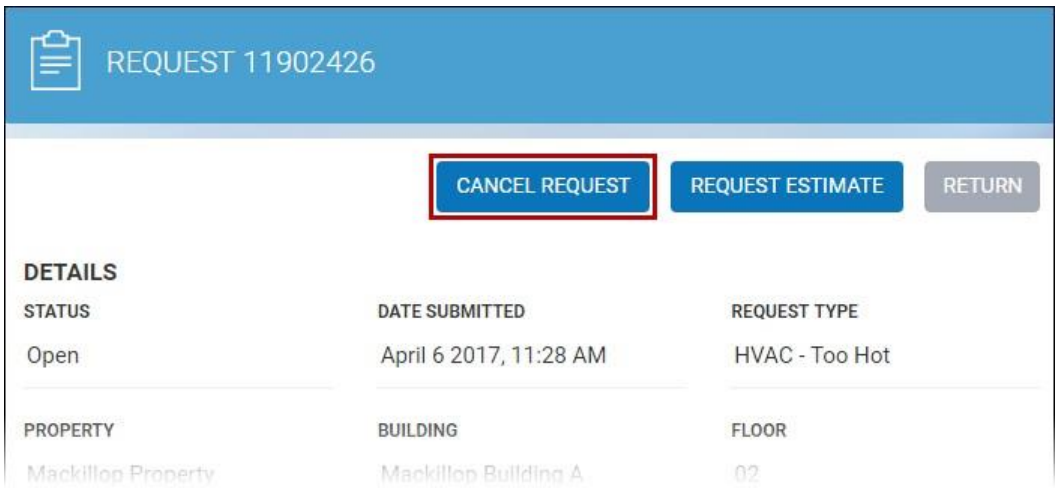
9. The service request is open, and work has not yet started.
10. The Service Request belongs to you.
11. If Tenant Authorization is used, the service request has already been authorized by a Tenant Authorizer.

If the above criteria are met, then you can cancel the service request by following the steps below:

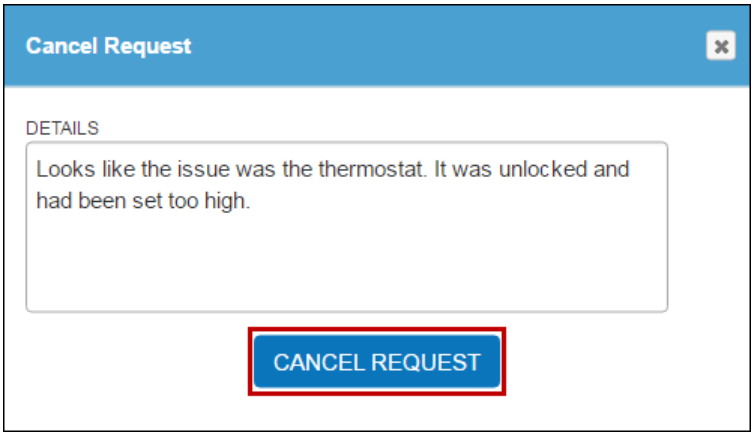
1. From the Service Requests list, locate the service request you wish to cancel. Click on the **Request Number** or double-click on the row to view its details.



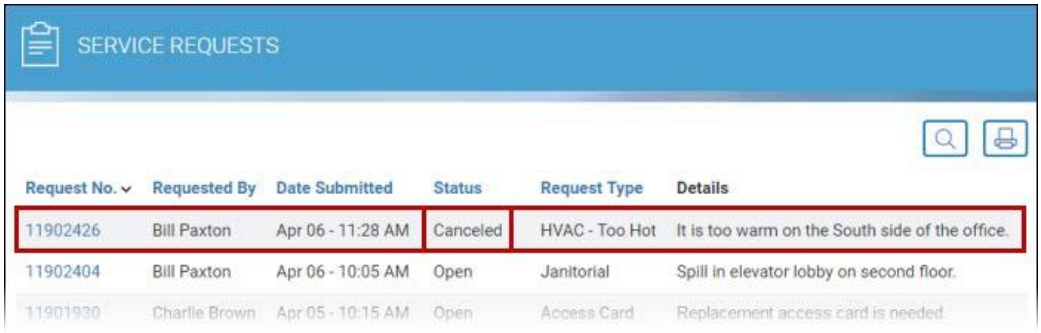
2. From the **Service Request Details** screen, click **Cancel Request**.



3. In the **Cancel Request** popup, explain the reason for canceling the work order in the **Details** field. This is a required field. Click **Cancel Request**.



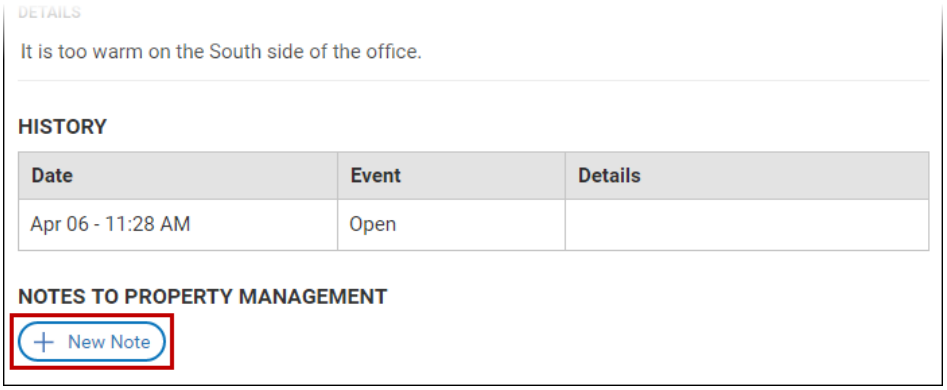
4. You will be returned to the Service Requests list. The service request is now marked as Canceled.



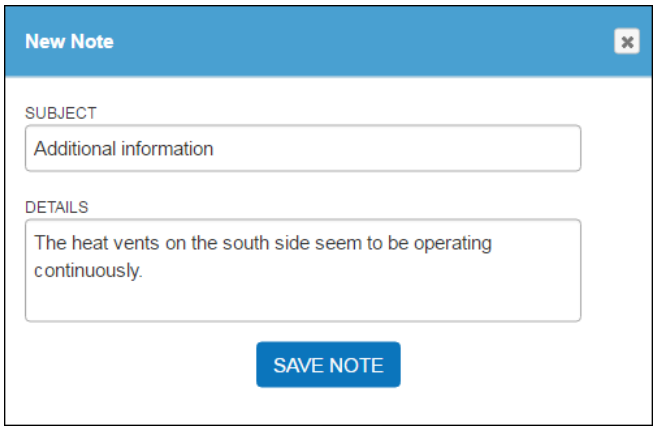
Sending a Note

You can append a note to a service request after it has been made. This can be used to provide additional information concerning the request. To send a note, follow these steps:

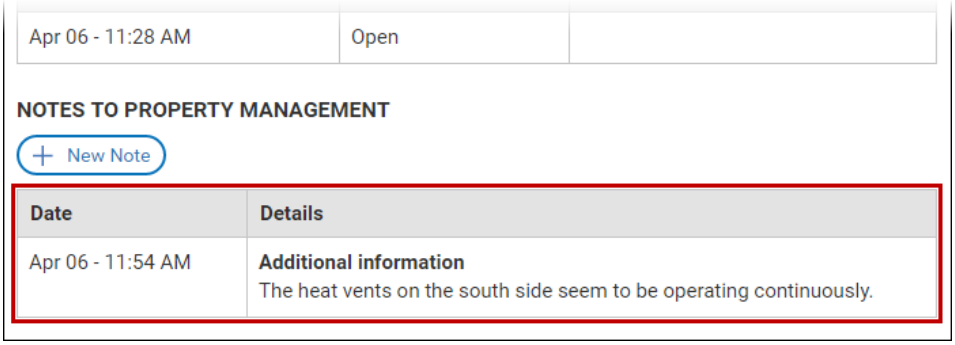
1. Using the Service Requests list, locate the service request you would like to add a note to. Click the request number to display the request details.
2. On the request details page, click **New Note**.



3. In the **New Note** window that opens, enter a subject name and details for the note, then click **Save Note**



4. The note has now been added to the service request.

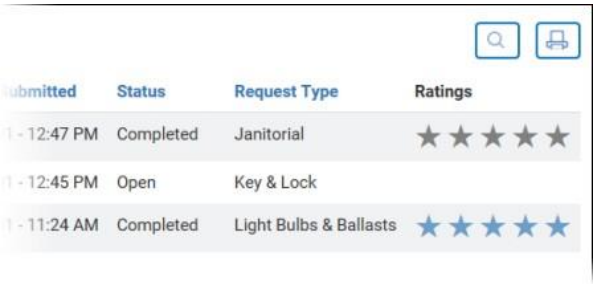


Service Rating

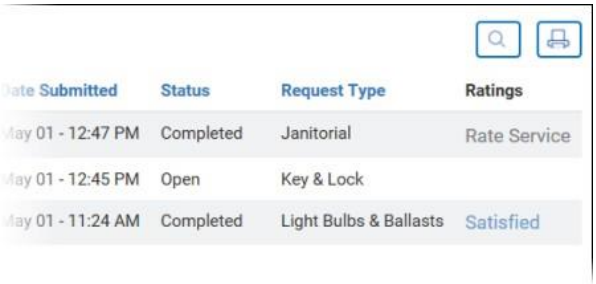
Service Rating is an optional feature that may be enabled by your Property Management company. The Service Rating system allows tenants to rate the overall quality of service received on Service Requests that have been completed. If enabled, you will be able to rate completed Service Requests using either a 2-point (satisfied/unsatisfied) or 5-point (1-5 stars) scale. Which scale is made available to you is determined by Property Management.

If the Service Rating feature has been enabled, you will see an additional **Ratings** column in your Service Requests list.

Ratings column with 5-Star rating (5-point scale)



Ratings column with Satisfaction rating (2-point scale)



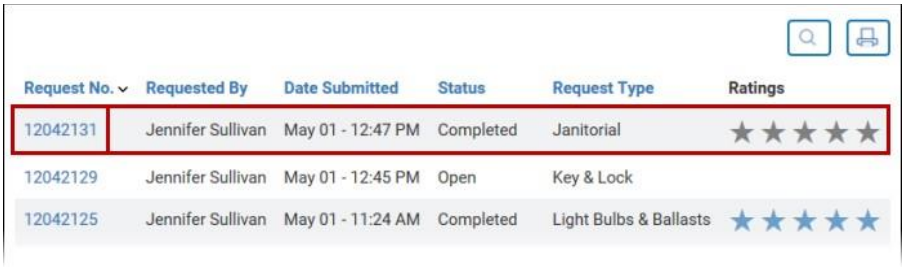
- If you are using the 5-star rating system, unrated service requests are marked with 5 gray stars in the Ratings column (shown above, left).
- If you are using the satisfaction rating system (**Satisfied** or **Unsatisfied**), unrated service requests are marked with **Rate Service** in the Ratings column (shown above, right).

Once one of your Service Requests has been marked as Completed, you will be able to rate the service provided using one of the two methods described below.

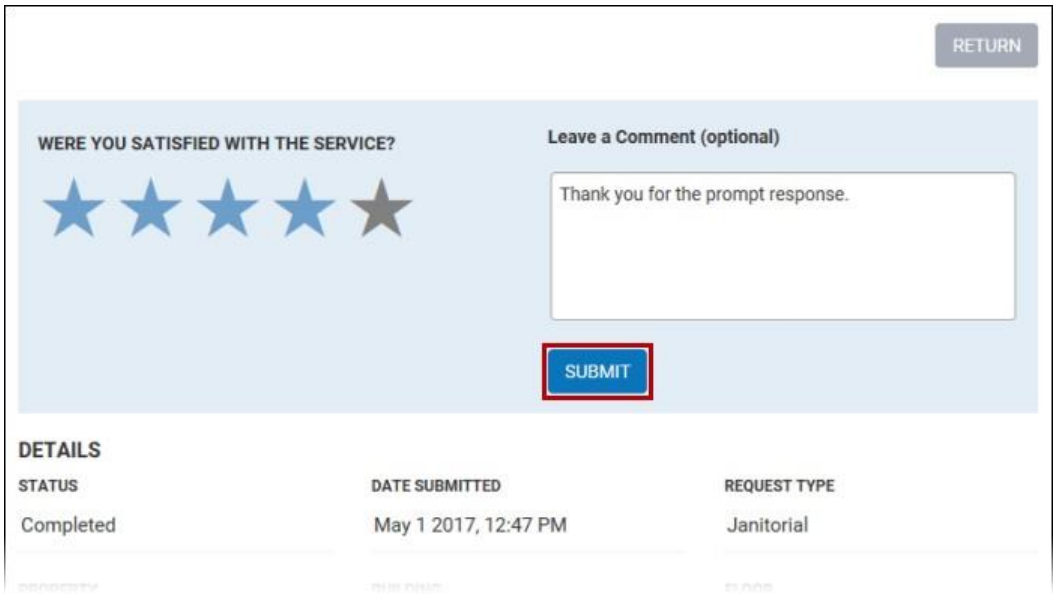
In the Service Portal

Completed Service Requests can be rated by viewing the request's details by following the steps below:

1. From the Service Requests list, Service Requests that have been completed and are available for rating are indicated in the **Ratings** column, as shown below.
2. To view the request's details, click on the **Request Number** or double-click on the row.



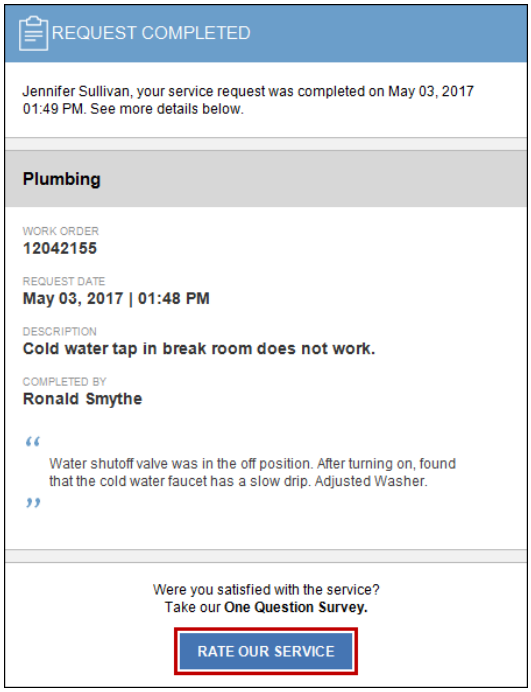
3. At the top of the Service Request Details screen is the Service Rating section. Rate the quality of service you received (you will either see a clickable 5-star rating system or **satisfied**/**unsatisfied** buttons).
    - If you would also like to leave a detailed comment, use the displayed text field on the right to provide additional feedback.
    - When you are finished, click **Submit**. Once you have pressed the **Submit** button, your rating will continue to be displayed at the top of the details screen but cannot be edited.
    - If your service request is reopened and then closed again (for example, in cases where additional work needed to be done), you will only be able to re-rate the service via e-mail notifications.

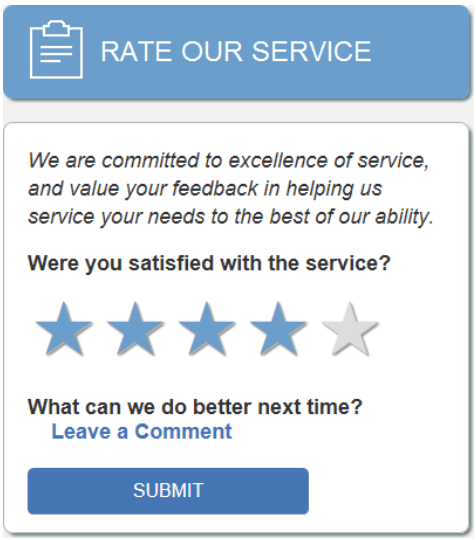


By Email

If your Service Portal account is subscribed to **Request Completed** notifications, then these emails will include a link to rate the quality of service you have received. For information on checking and updating your subscription settings, see Changing Your Profile.

1. In the Request Completed email notification, click the **Rate Our Service** link. This will open a page in your web browser.



2. On the web page that opens, rate the quality of service you received (either 1-5 stars, or Satisfied/Unsatisfied). If you would also like to leave a detailed comment, click **Leave a Comment** to display a text field that will allow you to provide additional feedback.

   - When you are finished, click **Submit**. Once you have pressed the **Submit** button, the link in the original email will instead direct you to a notice indicating that your feedback has already been received.
   - If your service request is reopened and then closed again (for example, in cases where additional work needed to be done), you will receive a new email message, allowing you to re-rate the service provided.