

Angus AnyWhere[®]

Service Portal

User Guide



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Getting Started

About the Service Portal

Your property management company has provided a self-service, web interface known as a Service Portal. This interface allows you to enter and track the status of your [Service Requests](#) (e.g. requests for repairs in your suite, or to report issues in other areas of the building). In addition, your Service Portal may include [Resource Reservations](#) and [Visitor Security](#).

Your property management company will provide a web address, user name and password for using your Service Portal.

Please note that the images included here are for instructional purposes only; depending on how your Service Portal has been configured, and the specific device you are using to access the Service Portal (such as a cellular phone, tablet, laptop or desktop computer), the interface may not appear exactly as depicted.



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. After logging in, users who are inactive for 60 minutes will be automatically logged out.

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**.

WELCOME TO THE SERVICE PORTAL

Easily access building operations information, services and submit service requests.

cathywu

Sign In

[Forgot your username or password?](#) Remember Me

To become a registered user, please contact Property Management.

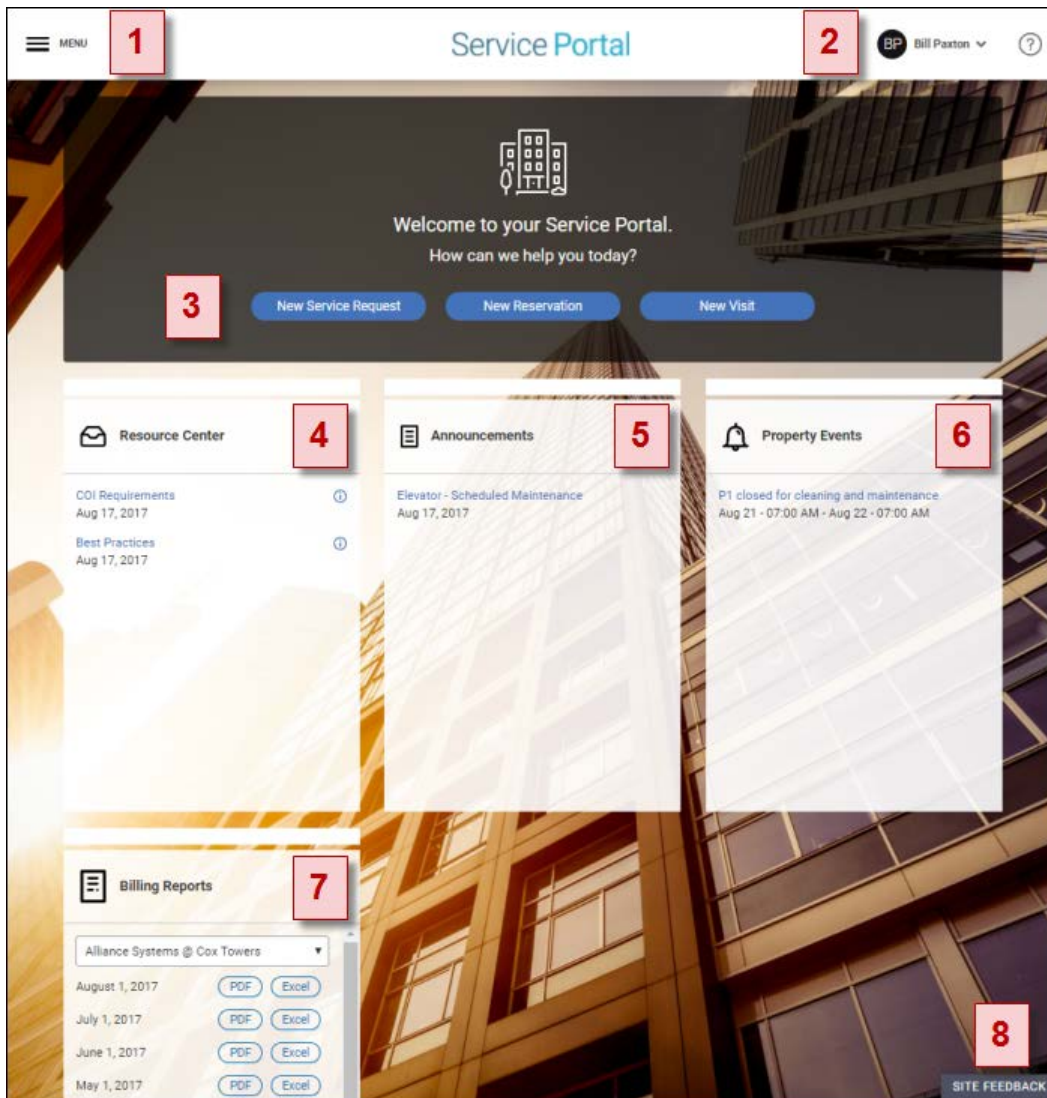
The screenshot shows a login interface with a city skyline background. It includes a title, a brief description of the portal's purpose, two input fields (one with the username 'cathywu' and one with masked characters), a blue 'Sign In' button, a 'Remember Me' checkbox, and a link for forgotten credentials. A footer note mentions contacting Property Management for registration.

The Home Page



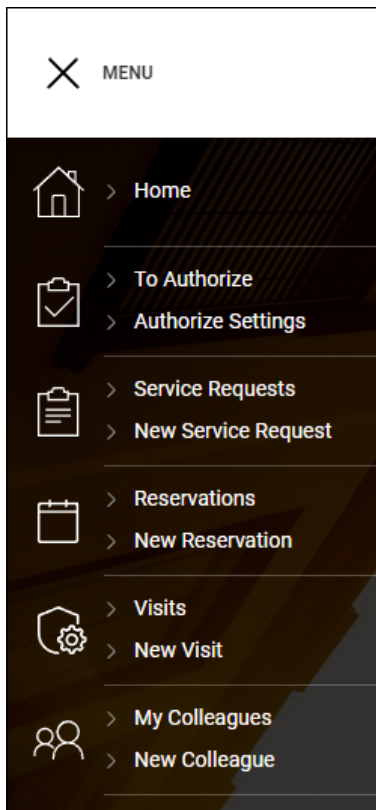
Depending on how your Service Portal has been configured, as well as your level of access, some features described below may not be available, or their exact positioning or appearance on the page may be different than shown below.

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).

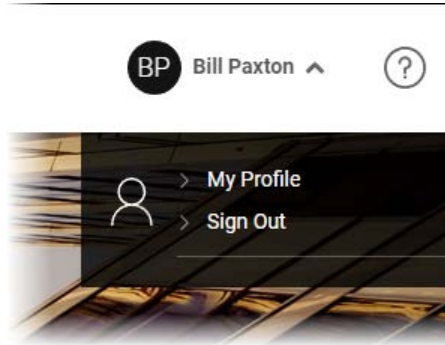
- At lower screen resolutions where the menu overlaps with other elements on the screen, the menu will automatically close after a selection is made.



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 you 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.

- **New Visit:** Enter a [new visit](#) to keep Property Management informed about your visitors, allowing security to check them in smoothly and efficiently.
 - **My Colleagues:** manage your [colleague's user settings](#). This option is only available if you are a Tenant Administrator.
 - **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.



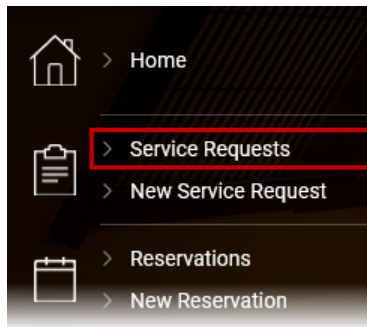
Contacts who can access all properties in a tenant group can use a drop-down list to select which tenant's billing reports to display.

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.


The screenshot shows a list of service requests with the following columns: Request No. (with a dropdown arrow), Requested By, Date Submitted, Status, and Request Type. The list contains several rows of data. Callout 1 points to the column headers. Callout 2 points to the first row. Callout 3 points to a green 'E' rating icon in the Status column. Callout 4 points to a search icon, and callout 5 points to a print icon, both located at the top right of the list area.

Request No. ▾	Requested By	Date Submitted	Status	Request Type
11929084	Bill Paxton	Apr 18 - 12:17 PM	Canceled	Key & Lock
11929082	Bill Paxton	Apr 18 - 12:15 PM	Open	Carpet
11929080	Bill Paxton	Apr 18 - 12:14 PM	Completed	HVAC - General
11929051	John Smythe	Apr 18 - 10:22 AM	Open	Key & Lock
11929049	John Smythe	Apr 18 - 10:21 AM	Open	HVAC - Too Cold
11929048	John Smythe	Apr 18 - 10:21 AM	Open	Carpet
11902426	Bill Paxton	Apr 06 - 11:28 AM	Canceled	HVAC - Too Hot
11902404	Bill Paxton	Apr 06 - 10:05 AM	Open	Janitorial

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.

☰ REQUEST 11902404


RETURN

DETAILS

STATUS	DATE SUBMITTED	REQUEST TYPE
Open	April 6 2017, 10:05 AM	Janitorial
PROPERTY	BUILDING	FLOOR
Mackillop Property	Mackillop Building A	02
SUITE		
Elevator Lobby		
PRIORITY		
Normal		
DETAILS		
Spill in elevator lobby on second floor.		

HISTORY

Date	Event	Details
Apr 06 - 10:05 AM	Open	


NOTES TO PROPERTY MANAGEMENT

+ New Note

Date	Details
Apr 06 - 10:46 AM	Floor condition The spill is causing the tile floor to be very slippery.


- 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.

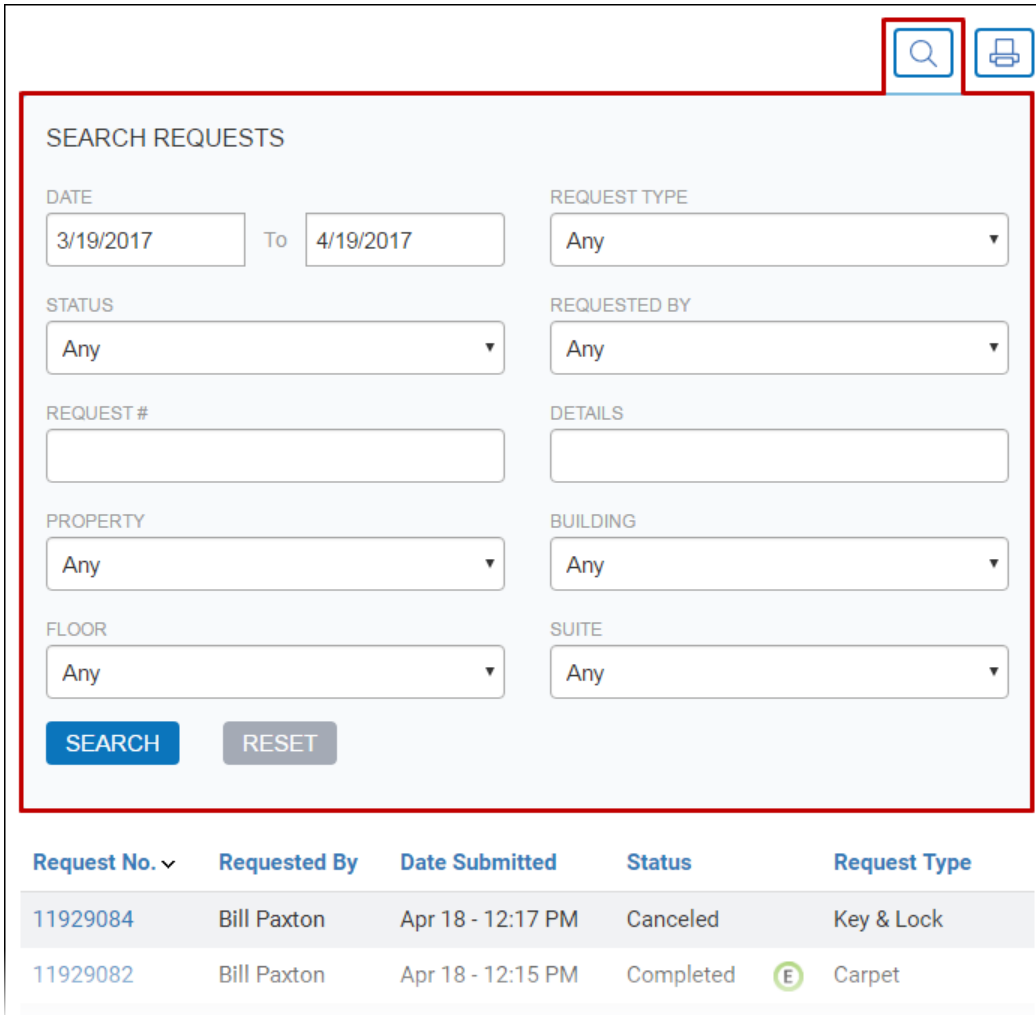
Requests with estimates associated with them indicate the status of these requests using color coded icons:

-  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.




Request No. ▾	Requested By	Date Submitted	Status	Request Type
11929084	Bill Paxton	Apr 18 - 12:17 PM	Canceled	Key & Lock
11929082	Bill Paxton	Apr 18 - 12:15 PM	Completed E	Carpet

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.

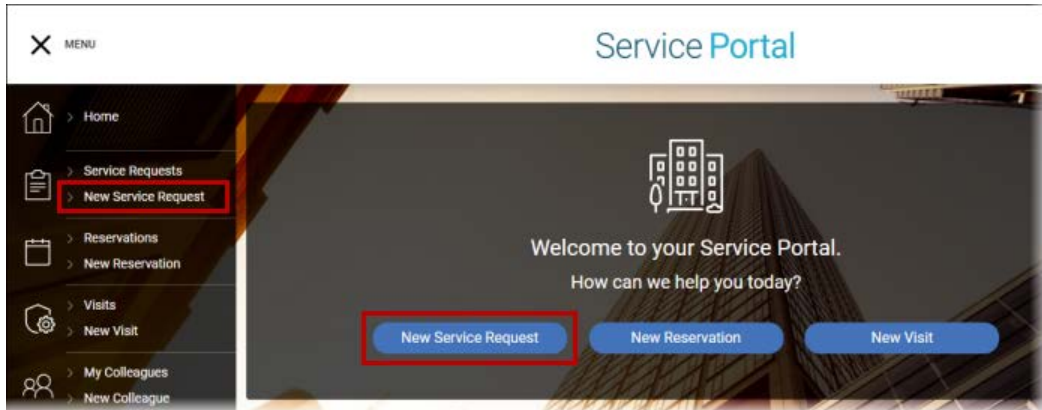
5. You can also click the **Print** icon () to print the details of each Service Request that is currently displayed.

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.

NEW SERVICE REQUEST

PROPERTY Mackillop Property

BUILDING

FLOOR

SUITE

REQUEST TYPE

PRIORITY

DETAILS

Estimate Required?

ATTACHMENTS

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.



REQUEST DETAILS 11902426

DATE RECEIVED April 6 2017, 11:28 AM	REQUEST TYPE HVAC - Too Hot	TENANT ACME Co.	CONTACT Bill Paxton
PROPERTY Mackillop Property	BUILDING Mackillop Building A	FLOOR 02	SUITE 202
PRIORITY Normal			
DETAILS It is too warm on the South side of the office.			
ESTIMATE REQUIRED No			
SUBMIT ANOTHER REQUEST		DONE	

- 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:

- The service request is open and work has not yet started.
- The Service Request belongs to you.
- 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:

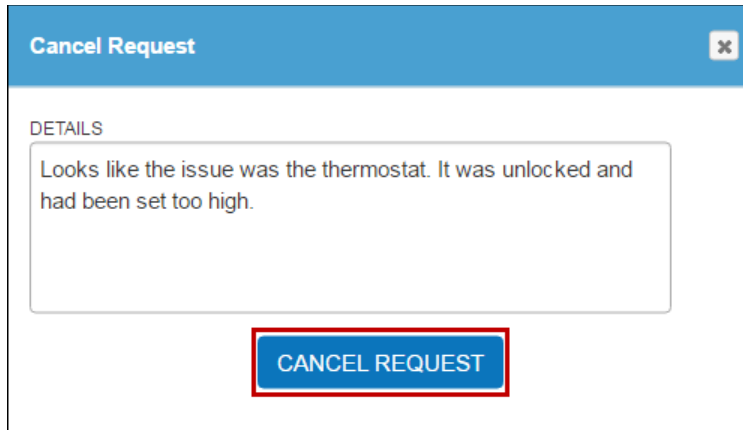
1. From the [Service Requests](#) list, locate the service request you wish to cancel. Click on the **Request Number** or double-click on the row to view its details.

Request No. ▾	Requested By	Date Submitted	Status	Request Type	Details
11902426	Bill Paxton	Apr 06 - 11:28 AM	Open	HVAC - Too Hot	It is too warm on the South side of the office.
11902404	Bill Paxton	Apr 06 - 10:05 AM	Open	Janitorial	Spill in elevator lobby on second floor.
11901930	Charlie Brown	Apr 05 - 10:15 AM	Open	Access Card	Replacement access card is needed.

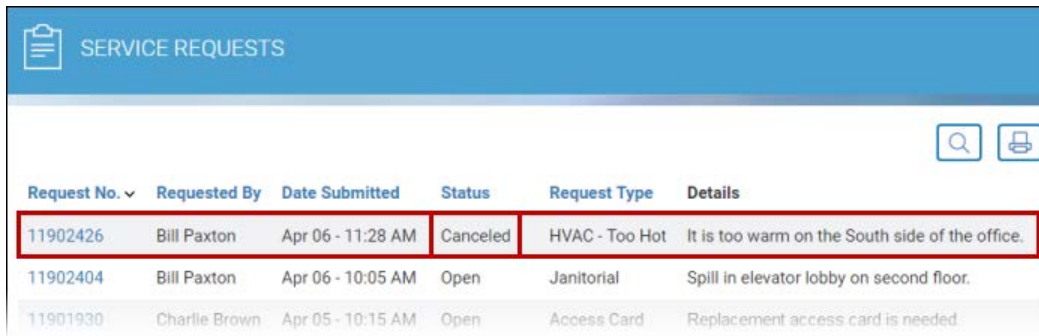
2. From the **Service Request Details** screen, click **Cancel Request**.

REQUEST 11902426		
CANCEL REQUEST REQUEST ESTIMATE RETURN		
DETAILS		
STATUS	DATE SUBMITTED	REQUEST TYPE
Open	April 6 2017, 11:28 AM	HVAC - Too Hot
PROPERTY	BUILDING	FLOOR
Mackillop Property	Mackillop Building A	02

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.



A screenshot of a "SERVICE REQUESTS" list. The table has columns for Request No., Requested By, Date Submitted, Status, Request Type, and Details. The first row is highlighted with a red border and shows a canceled request.

Request No. ▾	Requested By	Date Submitted	Status	Request Type	Details
11902426	Bill Paxton	Apr 06 - 11:28 AM	Canceled	HVAC - Too Hot	It is too warm on the South side of the office.
11902404	Bill Paxton	Apr 06 - 10:05 AM	Open	Janitorial	Spill in elevator lobby on second floor.
11901930	Charlie Brown	Apr 05 - 10:15 AM	Open	Access Card	Replacement access card is needed.

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**.

DETAILS

It is too warm on the South side of the office.

HISTORY

Date	Event	Details
Apr 06 - 11:28 AM	Open	

NOTES TO PROPERTY MANAGEMENT

+ New Note

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

New Note

SUBJECT

Additional information

DETAILS

The heat vents on the south side seem to be operating continuously.

SAVE NOTE

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

Apr 06 - 11:28 AM

Open

NOTES TO PROPERTY MANAGEMENT

+ New Note

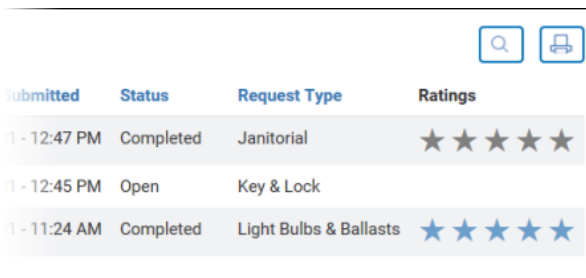
Date	Details
Apr 06 - 11:54 AM	Additional information The heat vents on the south side seem to be operating continuously.

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.

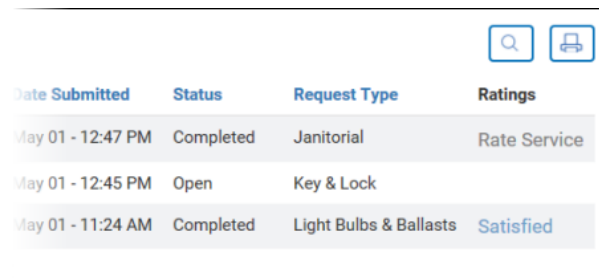
If the Service Rating feature has been enabled, you will see an additional **Ratings** column in your Service Requests list.

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



Submitted	Status	Request Type	Ratings
1 - 12:47 PM	Completed	Janitorial	★ ★ ★ ★ ★
1 - 12:45 PM	Open	Key & Lock	
1 - 11:24 AM	Completed	Light Bulbs & Ballasts	★ ★ ★ ★ ★

Ratings column with Satisfaction rating (2-point scale)



Date Submitted	Status	Request Type	Ratings
May 01 - 12:47 PM	Completed	Janitorial	Rate Service
May 01 - 12:45 PM	Open	Key & Lock	
May 01 - 11:24 AM	Completed	Light Bulbs & Ballasts	Satisfied

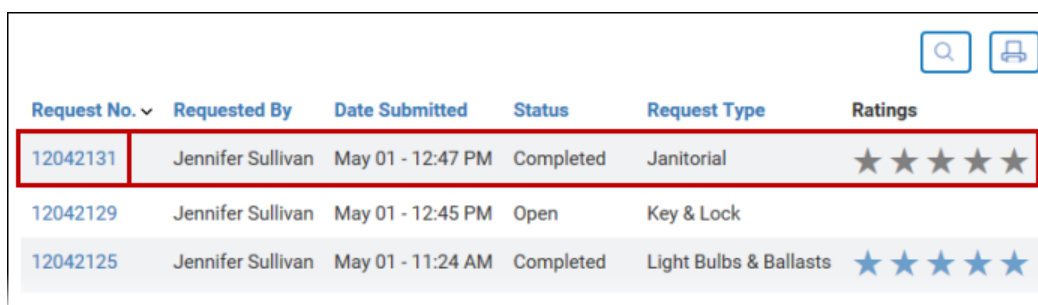
- If you are using the 5-star rating system, unrated service requests are marked with 5 gray stars in the Ratings column (shown above, left).
- If you are using the satisfaction rating system (**Satisfied** or **Unsatisfied**), unrated service requests are marked with **Rate Service** in the Ratings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

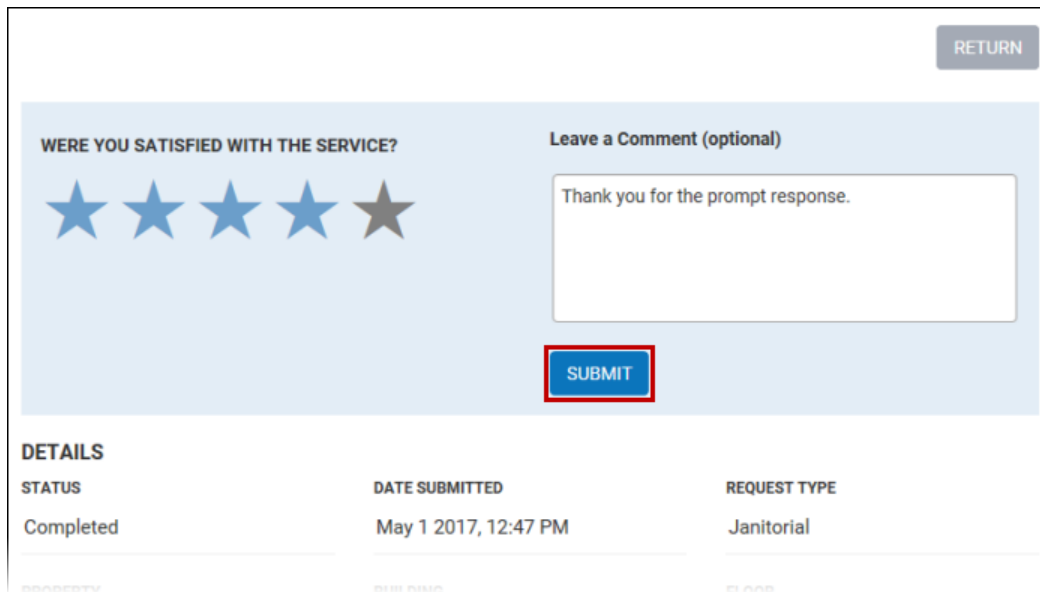
Completed Service Requests can be rated by viewing the request's details by following the steps below:

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.



Request No. ▾	Requested By	Date Submitted	Status	Request Type	Ratings
12042131	Jennifer Sullivan	May 01 - 12:47 PM	Completed	Janitorial	★ ★ ★ ★ ★
12042129	Jennifer Sullivan	May 01 - 12:45 PM	Open	Key & Lock	
12042125	Jennifer Sullivan	May 01 - 11:24 AM	Completed	Light Bulbs & Ballasts	★ ★ ★ ★ ★

- 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](#).




The screenshot shows a service request details page. At the top right is a 'RETURN' button. Below it is a section titled 'WERE YOU SATISFIED WITH THE SERVICE?' with a 5-star rating system where the first four stars are blue and the fifth is grey. To the right is a 'Leave a Comment (optional)' section with a text input field containing 'Thank you for the prompt response.' and a blue 'SUBMIT' button. Below this is a 'DETAILS' section with a table:

STATUS	DATE SUBMITTED	REQUEST TYPE
Completed	May 1 2017, 12:47 PM	Janitorial

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](#).

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

 REQUEST COMPLETED

Jennifer Sullivan, your service request was completed on May 03, 2017 01:49 PM. See more details below.

Plumbing

WORK ORDER
12042155

REQUEST DATE
May 03, 2017 | 01:48 PM

DESCRIPTION
Cold water tap in break room does not work.


COMPLETED BY
Ronald Smythe

“
Water shutoff valve was in the off position. After turning on, found that the cold water faucet has a slow drip. Adjusted Washer.
”

Were you satisfied with the service?
Take our **One Question Survey**.


[RATE OUR SERVICE](#)

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.

 RATE OUR SERVICE

We are committed to excellence of service, and value your feedback in helping us service your needs to the best of our ability.

Were you satisfied with the service?



What can we do better next time?
[Leave a Comment](#)

SUBMIT

Resource Reservations

About Resource Reservations

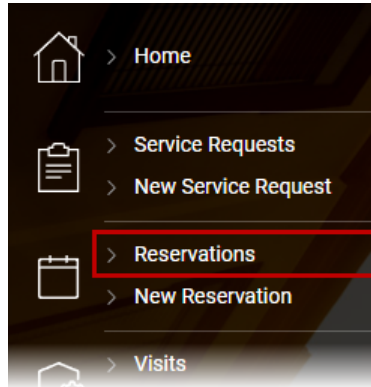
Resource Reservations allows tenants to reserve resources such as a conference rooms, freight elevators, and loading docks.

Key features

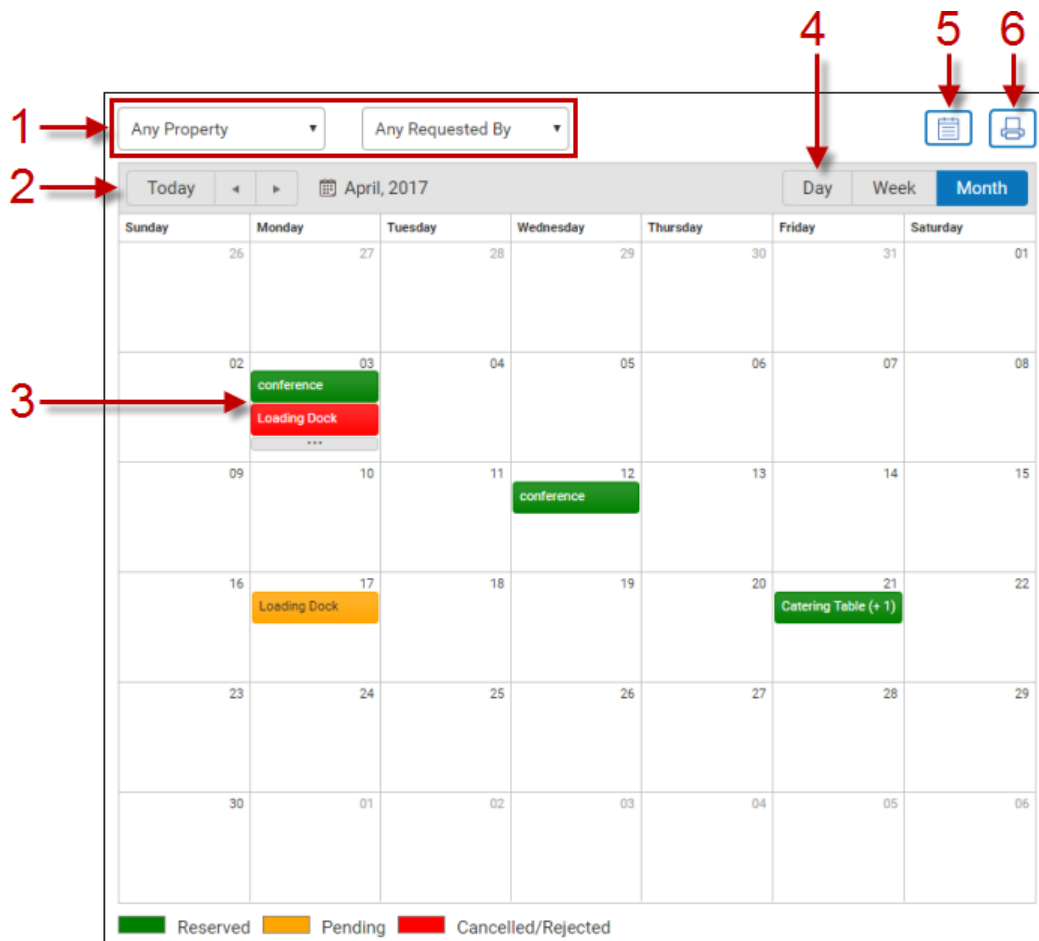
- Use a Calendar interface to submit new reservations and view upcoming ones.
- Receive e-mail confirmations when your reservation is created, approved, or rejected.
- Track the status of your reservation, especially in cases where approval of your reservation is required by property management.
- Cancel or reschedule reservations you had previously submitted. Canceled or rescheduled reservations may incur a service charge. Please review your Property Manager's policies to determine if this will be the case.
- If made available by Property Management, reserve resources in other nearby properties.

The Reservations Calendar



The My Reservations calendar allows you to view and search through reservations that have been made by you or your colleagues, such as for service elevators and meeting rooms. To access the calendar, click on **Reservations** from the navigation menu.



By default, the calendar displays reservations submitted in the current month. An overview of the calendar and its functions is provided below.

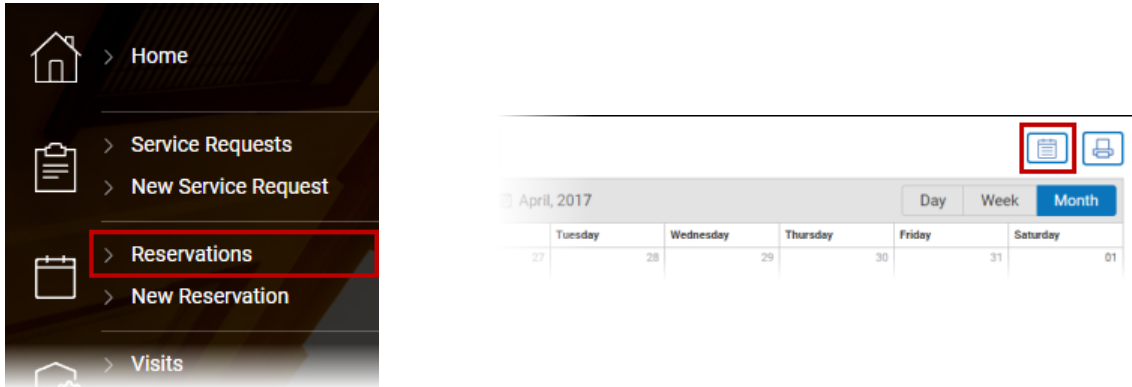


1. Depending on your level of access and the way resources have been set up by property management, the following dropdown menus may be available:

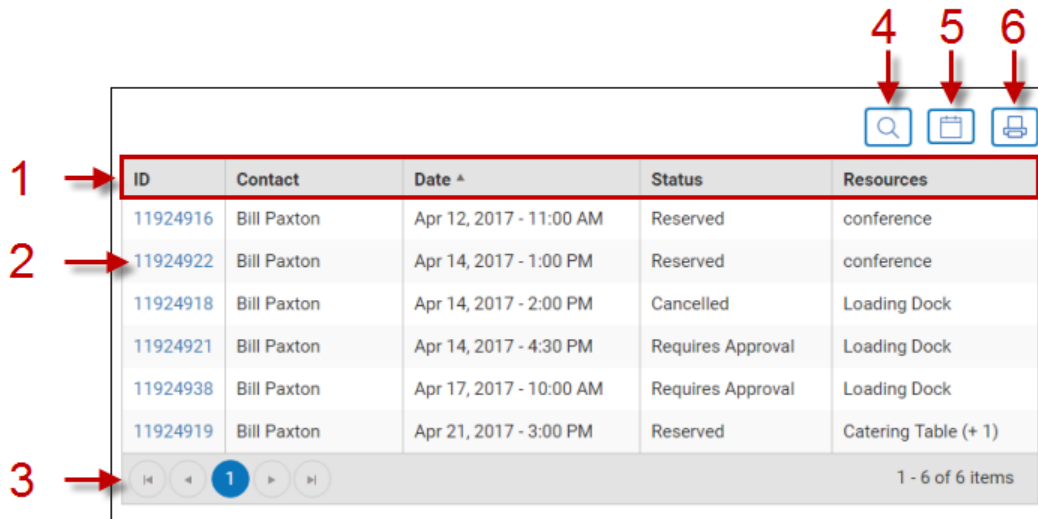
- If Property Management has made resources from other properties available to you, you can use the **Property** dropdown list to view reservations submitted in specific properties, or select **Any Property** (default) to see all reservations across all properties.
 - If you are able to view your colleagues' reservations, you can use the **Requested By** dropdown list to filter the calendar by colleague, or select **Any Requested By** (default) to see all reservations. If you do not have access to view your colleagues' reservations, only your own reservations are displayed.
2. The **Previous** (◀) and **Next** (▶) buttons are used to page between months, weeks, or days, depending on the calendar's view mode as described in (4) below. The **Today** button will return you to the current month, week or day, as applicable.
 3. The calendar displays submitted reservations and their current status.
 - Confirmed reservations are marked in green.
 - Reservations that require approval from Property Management are marked in yellow.
 - Reservations marked in red are either canceled reservations, or reservations that were not approved by Property Management.
 - If more than two reservations fall within a particular day (in monthly view mode), clicking the **More** button (...) will change the calendar to a daily view, allowing you to see all reservations made in the current day.
 - Clicking on a reservation will take you to the reservation's Details screen. See [The Reservation Details Screen](#) for additional information.
 4. The **Month**, **Week** and **Day** buttons allow you to toggle the calendar between a monthly, weekly and daily view.
 5. Use the **List** button () to view reservations in a list format. See the [The Reservations List](#) topic for additional details.
 6. The **Print** button () will print reservations for the currently displayed reservations in a list format.

The Reservations List

The Reservations list allows you to view and search through reservations that have been made by you or your colleagues, such as for service elevators and meeting rooms. To access the list, click **Reservations** in the navigation menu, then click the **List** button (📄) at the top of the calendar interface.



By default, the calendar displays reservations submitted in the current month. An overview of the list and its functions are provided below.



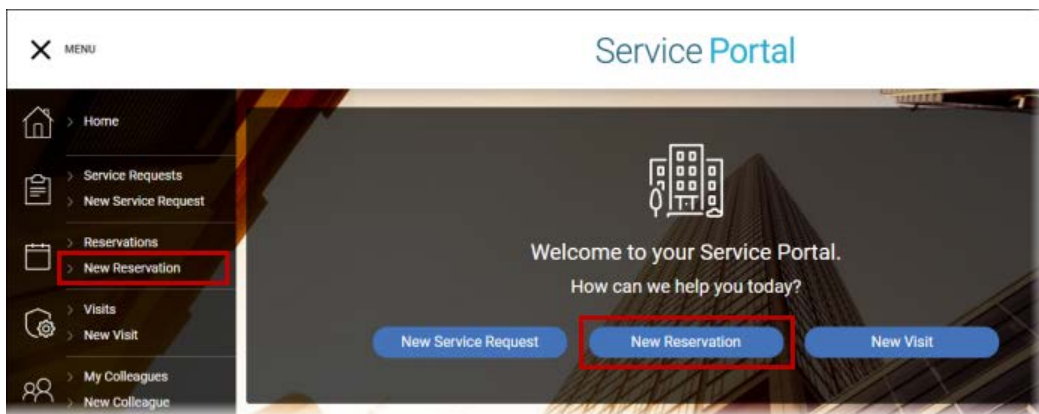
1. Click on the column headings to sort the list in ascending or descending order.
2. Clicking on a reservation will take you to the reservation's Details screen. See [The Reservation Details Screen](#) for additional information.
3. The list is paginated if there are a large number of reservations. You can use the **Previous** (⏪) and **Next** (⏩) buttons to view the previous or next page. The **First Page** (⏪) and **Last Page** (⏩) buttons can be used to jump directly to the first or last page.
4. Clicking the **Search** icon (🔍) displays additional options for filtering the list, as detailed below.

The following filtering options are available:

- If you have access to resources on multiple properties, you can use the **Property** dropdown list to select a specific property to display reservations for, or view all properties by selecting **Any Property** (default).
 - You can filter by a specific date range using the **Date** buttons (📅).
 - If you are able to view your colleagues' reservations, you can use the **Requested By** dropdown list to filter the calendar by colleague, or view all requests by selecting **Any Requested By** (default). If you do not have access to view your colleagues' reservations, only your own reservations are displayed.
 - Press **Search** to filter the list with the settings you have selected.
5. Use the **Calendar** button (📅) to display reservations in a calendar format. See the [My Reservations Calendar](#) topic for additional details.
 6. The **Print** button (🖨️) will print reservations for the currently displayed month in a list format.

Making a Reservation


To begin making a new reservation, click **New Reservation** from the navigation menu (☰ MENU), or click the **New Reservation** quick link from the Home page. This will open the New Service Request screen.



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

1. In the new reservation window, a list of available resources is displayed on the left, and a weekly calendar is displayed to the right. You can view additional information concerning a resource by clicking on its associated info icon (i). Depending on the information supplied by Property Management, the resource information popup may display the following information:
 - An image gallery. You can click on any of the images in the gallery to view them in fullscreen mode
 - Whether the resource is billable (usage fees may apply), and whether reservations will require approval from Property Management
 - A description of the resource's features
 - Any additional downloadable attachments (displayed as links)
 - Any additional instructions concerning its usage
 - The resource's hours of availability
 - Any applicable reservation policies, such as maximum reservation duration, or conditions under which a rescheduling or cancellation fee may apply. Please note that rescheduling and cancellation fees are not related to whether the resource is listed as "billable", which refers to fees that may be incurred through use of the resource.

CONFERENCE ROOM 1



Resource is billable
 Approval required by property management

ABOUT CONFERENCE ROOM 1

Seats 8 and provides the following: Widescreen TV, 2.1 Sound System, standard conference phone.

AMENITIES INCLUDED	AMENITIES AVAILABLE ON REQUEST	ATTACHMENTS
<ul style="list-style-type: none"> Water Cooler 	<ul style="list-style-type: none"> WiFi <input type="checkbox"/> 	<ul style="list-style-type: none"> conference_phone_manual.pdf

TERMS AND CONDITIONS

To complete your reservation, you must sign and return the Code of Conduct form.

RESERVATION POLICIES

- Resource can't be used for more than 2 Hour(s) per reservation
- Resource must be reserved 1 Day(s) in advance
- Resource can't be reserved more than 2 Month(s) ahead
- Consecutive reservations must be 30 Minute(s) apart
- Reservations can be rescheduled or cancelled 1 Day(s) before start time without charges applied.

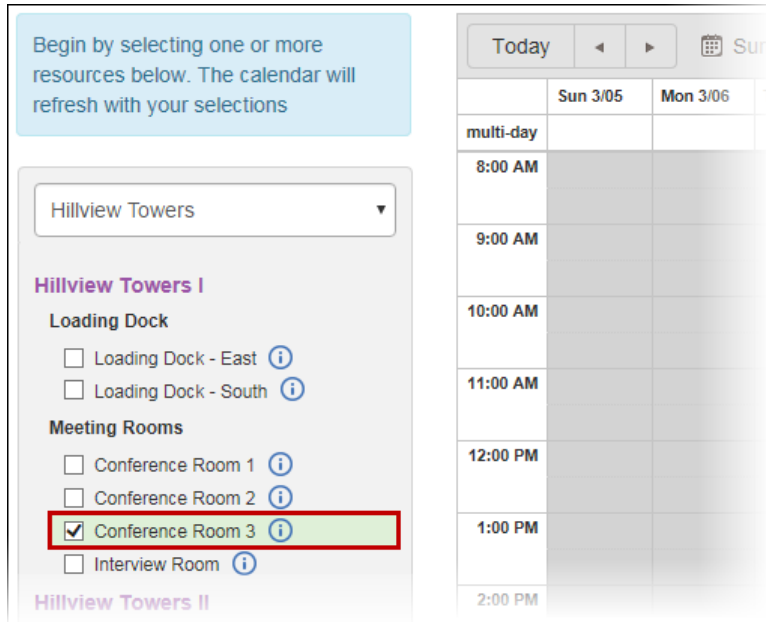
RESOURCE AVAILABILITY

Availability

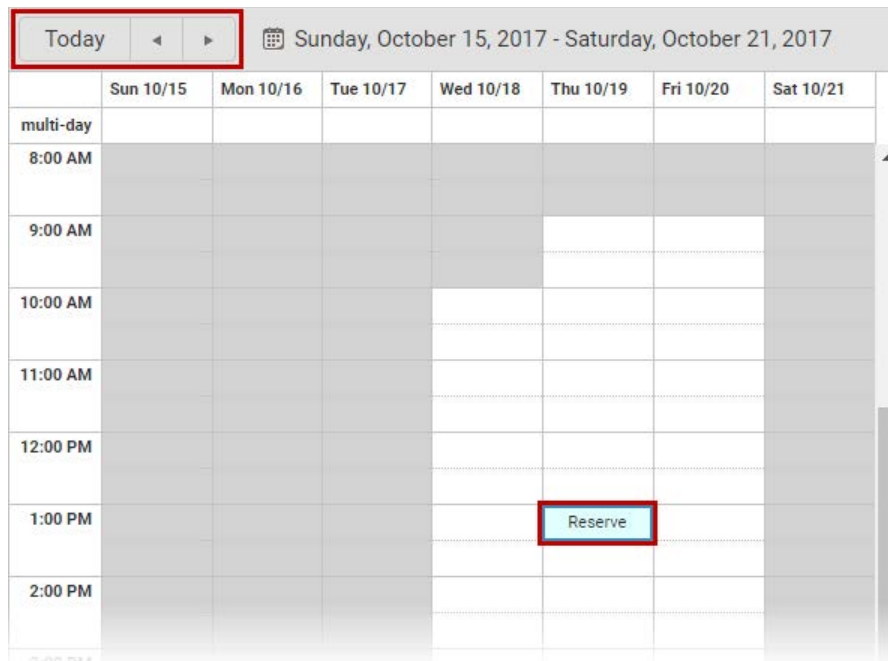
- Mon-Fri 9:00 AM - 5:00 PM

[CLOSE](#)

- Select one or more resources that you would like to reserve in the same time slot. If Property Management has made resources from more than one property available to you, then a **Property** dropdown list is displayed, allowing you to select which property you would like to view available resources for.



- On the calendar to the right, available reservation times are displayed for the current week in white.
 - You can switch between weeks using the Previous and Next buttons, and return to the current week by clicking the **Today** button.
 - Click on an available slot in your calendar to select your reservation time.



- In the New Reservation window that opens, the following information can be edited:
 - The date portion of the **Time Start** and **Time End** fields can be updated by clicking on their associated **Calendar** (📅) icons and selecting a new date time. You can update the

start and end times by clicking on the time and selecting a new time from the dropdown list.

- Please note that if you modify the start or end time such that it overlaps with a time when a resource is not available, you will receive an error when attempting to complete the reservation.
- By default, the **Requested By** field lists you as the requester. If you are creating the reservation on behalf of a colleague, you can change this by using the provided dropdown list. Only other registered users are displayed in this list.
- Fill in any **Additional Information** in the fields provided (these fields are only displayed if Property Management needs additional details concerning the resource's use).
- Additional amenities available at the resource's location are listed. If any of the amenities are optional and must be specifically requested, place a checkmark beside any optional amenities that you need. Additional notes concerning the amenity can be viewed in a popup by clicking on the amenity's name.



Amenities marked as billable (💰) will incur an additional service fee.

- You can use the **Reservation Notes** field to enter any applicable notes for Property Management.
- If there are terms and conditions that must be agreed to prior to making the reservation, then a **I have reviewed and agreed to the following Terms and Conditions** checkbox is displayed. You must check this box to proceed. Before agreeing to the terms and conditions, you should review them by clicking on the **Terms and Conditions** link displayed in this section.

6. Click **Create** to complete the reservation request.

NEW RESERVATION

Reserve | Documentation Required | Approval Required

RESOURCES: Conference Room 3

TIME START: 10/19/2017 01:00PM

TIME END: 10/19/2017 01:30PM

REQUESTED BY: Bill Paxton

ADDITIONAL INFORMATION:

1. SEATING LAYOUT: O-Shape

2. NUMBER OF ATTENDEES: 10

AMENITIES:

INCLUDED: Water Cooler

AVAILABLE ON REQUEST: WiFi

RESERVATION NOTES: Please provide 2 additional chairs

TERMS AND CONDITIONS: I have reviewed and agreed to the following Terms and Conditions [Terms and conditions](#)

CREATE CANCEL

6. If there are no issues with your reservation, your request is submitted and you will be taken to the [Reservation Details screen](#).

- If additional documentation must be downloaded, filled in/signed and then re-uploaded to finalize your reservation, this will be clearly marked at the top of the reservation screen. Any additional documentation will be listed as download links. Corresponding **Upload** links are displayed, allowing you to upload the completed document.
 - You do not need to upload the documents immediately. You can upload the documents at a later time by returning to the details screen. For additional details, see [The Reservation Details Screen](#).

The reservation is created successfully. Please download, complete, then upload the following document(s) for review and approval.

Code of Conduct
↓ code_of_conduct.pdf | **UPLOAD**

Reservation Details

- After uploading a document, it is displayed as a downloadable document with a corresponding **Replace** button. If you need to upload a corrected version of the document, click the **Replace** button and select the file to upload.

REQUIRES APPROVAL: All required document(s) have been submitted to Property Management Office for review and approval. You will be notified when the reservation is confirmed.

Code of Conduct
↓ code_of_conduct.pdf | code_of_conduct.pdf **REPLACE**

Reservation Details

The Reservation Details Screen

The Reservation Details screen is accessed by clicking on a reservation in the [Reservation Calendar](#) or [Reservation List](#). The following information and buttons are displayed:

1 → RESERVATION 19972107

2 → CANCEL RESERVATION RETURN

4 → Reserved Documentation Required Approval Required

5 → **REQUIRES APPROVAL:** All required document(s) have been submitted to Property Management Office for review and approval. You will be notified when the reservation is confirmed.

Code of Conduct
 ↓ code_of_conduct.pdf | code_of_conduct.pdf REPLACE

6 { Reservation Details

RESOURCES Conference Room 1

REQUESTED BY Bill Paxton

RESERVATION DATE AND TIME Oct 19, 2017 - 1:00 PM to 1:30 PM RESCHEDULE **8**

DURATION 30 minute(s)

PROPERTY Cox Towers

BUILDING Tower I

ADDITIONAL INFORMATION

1. SEATING LAYOUT O-Shape

2. NUMBER OF ATTENDEES 10

AMENITIES

INCLUDED Water Cooler

REQUESTED WiFi ⓘ

RESERVATION NOTES

Please provide 2 additional chairs EDIT **9**

7 → History

Date	Event	Notes
Oct 18, 2017 - 11:28 AM	Updated	Required document updated
Oct 18, 2017 - 10:36 AM	Requires Approval	
Oct 18, 2017 - 10:36 AM	Submitted	

1. The reservation ID number.
2. If enabled by Property Management, you can click **Cancel Reservation** to cancel the reservation (you can only cancel upcoming reservations). See [Canceling a Reservation](#) for more information.
3. Click **Return** to go back to either the Reservations List or Reservations Calendar.
4. If the resource being reserved requires additional documentation to be downloaded, filled in/signed and then re-uploaded to finalize the reservation, this will be clearly marked at the top of the reservation screen. If all documentation has been uploaded, then the **Requires Approval** icon is highlighted, as shown above. Reservations that do not require uploading documents do not display these icons.
5. If a reservation is still pending approval by property management, then a **Requires Approval** message is displayed. If documentation needs to be uploaded, this section also provides an interface to download the documents that must be filled out, and a means of uploading the completed documents.
 - If a document has already been uploaded but needs to be replaced, click the **Replace** button (as shown above). Documents that have not yet been uploaded will instead display an **Upload** button.
 - Documents can be downloaded, uploaded or replaced at any time by returning to the details screen. It is not necessary to perform this task during a single log-in session.
6. The Reservation Details section displays the following information:
 - The resource(s) requested.
 - The name of the requestor.
 - The reservation date and time.
 - The duration and location where the reservation will take place.
 - The responses given to any additional questions that were asked during the reservation process. If these responses need to be changed, contact your Property Management office.
 - All included amenities and selected optional amenities. If any selections made here need to be changes, contact your Property Management office.
 - Any notes for Property Management that you have added to the request; see (9) below.
7. The History section displays a record of status changes related to the request, with the date and time of each status change displayed.
8. Click **Reschedule** to change the date and time of the reservation. See [Rescheduling a Reservation](#) for additional details.
9. In the **Reservation Notes** section, you can update any existing notes you have entered by clicking the **Edit** button (shown above). If no notes were originally provided, you can create notes by clicking the **Add** button.

Canceling a Reservation

Reservations can be canceled from either the [Reservations Calendar](#) or the [Reservations List](#) by viewing a reservation's details and clicking **Cancel Reservation**. Please note that depending on your level of access, you may only be able to cancel reservations made in your name. Additionally, you can only cancel upcoming reservations with a status of Requires Approval, Approved, or Reserved.

1. On the Reservation Details screen, click **Cancel Reservation**.

RESERVATION 11924938

CANCEL RESERVATION RETURN

REQUIRES APPROVAL: Your reservation requires approval by your Property Management Office. You will be notified when the reservation is confirmed.

Reservation Details

RESOURCES	REQUESTED BY	RESERVATION DATE AND TIME
Loading Dock	Bill Paxton	Apr 17, 2017 - 10:00 AM to 10:30 AM

RESCHEDULE

DURATION PROPERTY BUILDING

2. In the **Cancel Reservation** popup, enter a reason for the cancellation. In situations where a cancellation fee may be charged, you will be informed in this popup window.

Cancellation with no service charge

CANCEL RESERVATION

Reservation will be cancelled.

REASON FOR CANCELLATION:

Key attendees will be unavailable.

YES **NO**

Cancellation where service charge may apply

CANCEL RESERVATION

Cancellation charge may apply when reservation is cancelled less than 24 Hour(s) before the start time.

Do you wish to proceed?

REASON FOR CANCELLATION:

Key attendees will be unavailable.

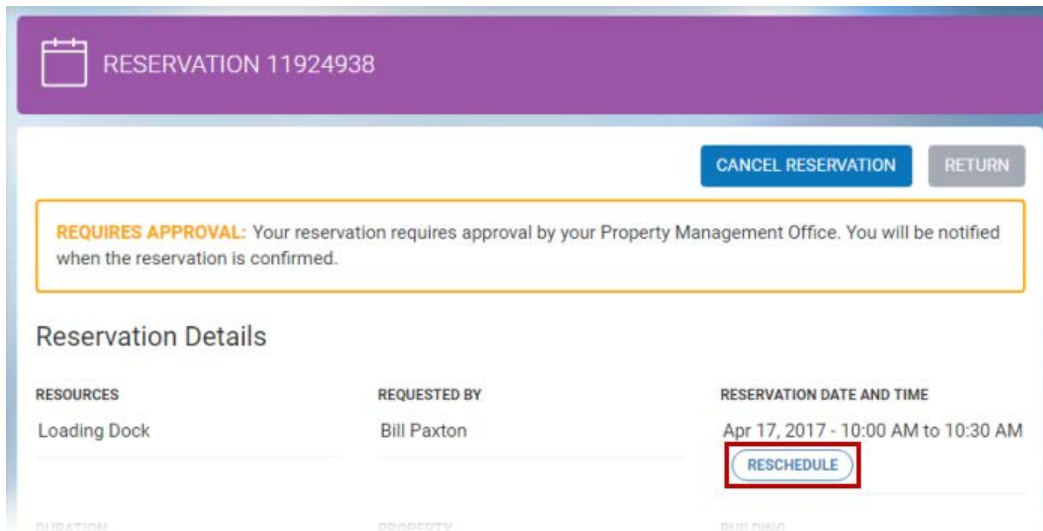
YES **NO**

3. Click **Yes** to confirm the cancellation.

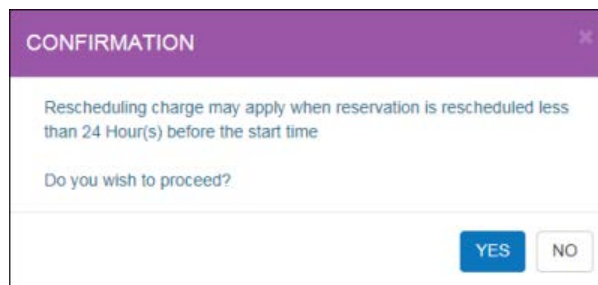
Rescheduling a Reservation

Reservations can be rescheduled from either the [Reservations Calendar](#) or the [Reservations List](#) by viewing a reservation's details and clicking **Reschedule**. Please note that depending on your level of access, you may only be able to reschedule reservations made in your name. Additionally, you can only reschedule upcoming reservations with a status of Requires Approval, Approved, or Reserved.

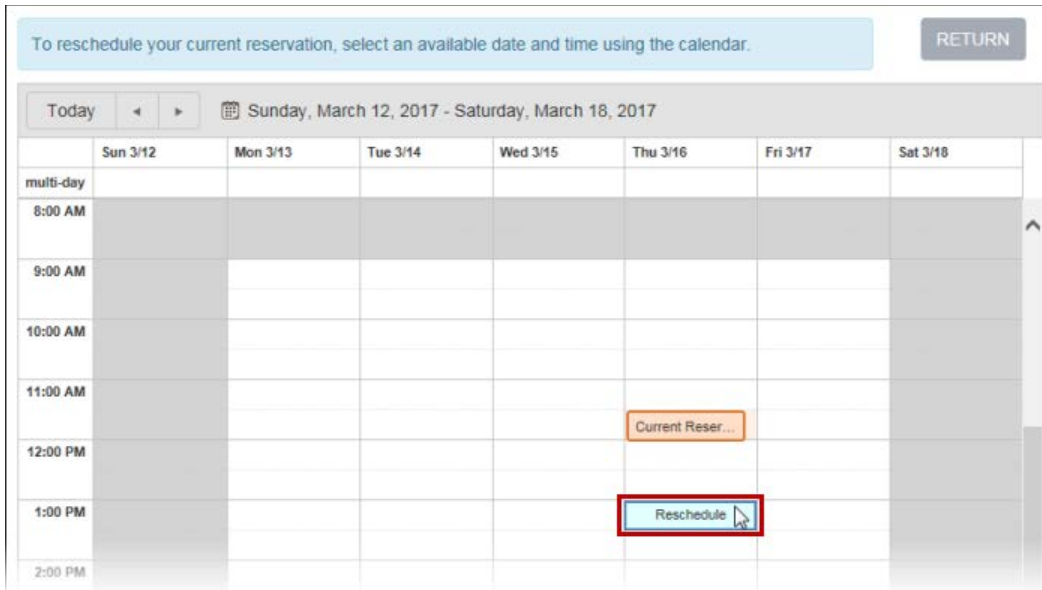
1. On the Reservation Details screen, click **Reschedule**.



2. If a rescheduling fee may apply, a confirmation popup will be displayed. Click **Yes** to proceed.
 - If no rescheduling fee is applicable, you will be taken directly to step 3 below.



3. You will be taken to a calendar view, allowing you to select a new date and time for the reservation. Click on an available slot to reserve it.



4. In the **Reschedule Reservation** popup, verify the dates and times listed for the new start and end time, and make any necessary corrections. Enter a reason for the rescheduling and click **Done**. Your reservation has now been rescheduled.

RESCHEDULE RESERVATION

RESOURCES: Conference Room 3 (i)

TIME START: 3/16/2017 01:00PM ▼

TIME END: 3/16/2017 01:30PM ▼

REQUESTED BY: Bill Paxton ▼

REASON FOR RESCHEDULE:

Key attendees were unavailable at the original time.

DONE
CANCEL

Meeting Room Panel

About Meeting Room Panel

Meeting Room Panel is a touchscreen solution that allows tenants to browse room availability and create, change, or cancel a reservation right at the meeting room door.



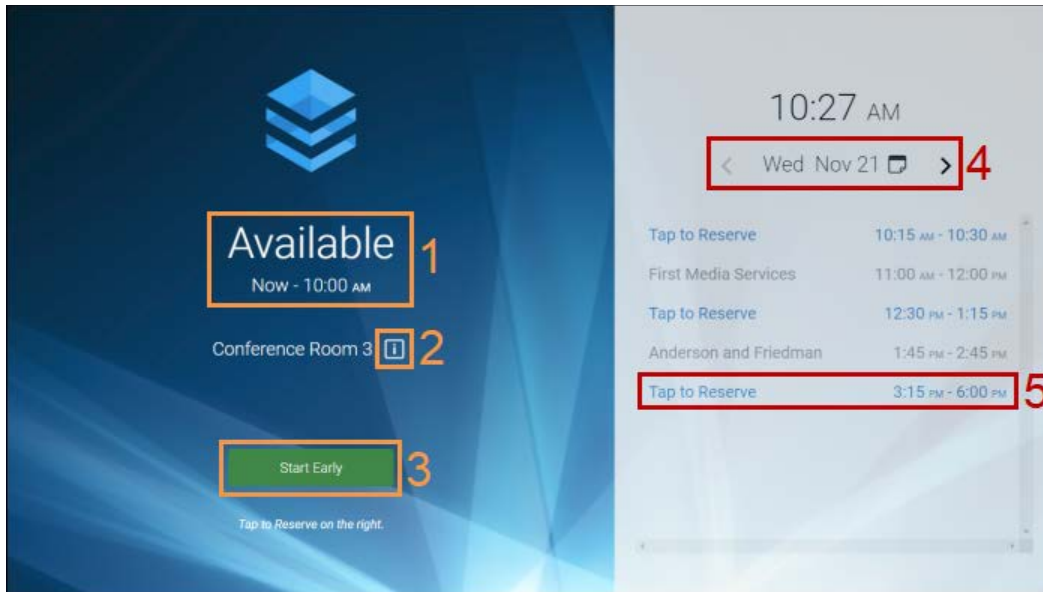
If this feature is available in your building, refer to the additional topics in this section. Other topics that may be useful are [Changing Your Profile](#) and (for Tenant Administrators) [Modifying Colleagues](#), both of which contain information on how to send or re-send the login information needed to use Meeting Room Panels.

The Meeting Room Panel Interface (Reservation Mode)

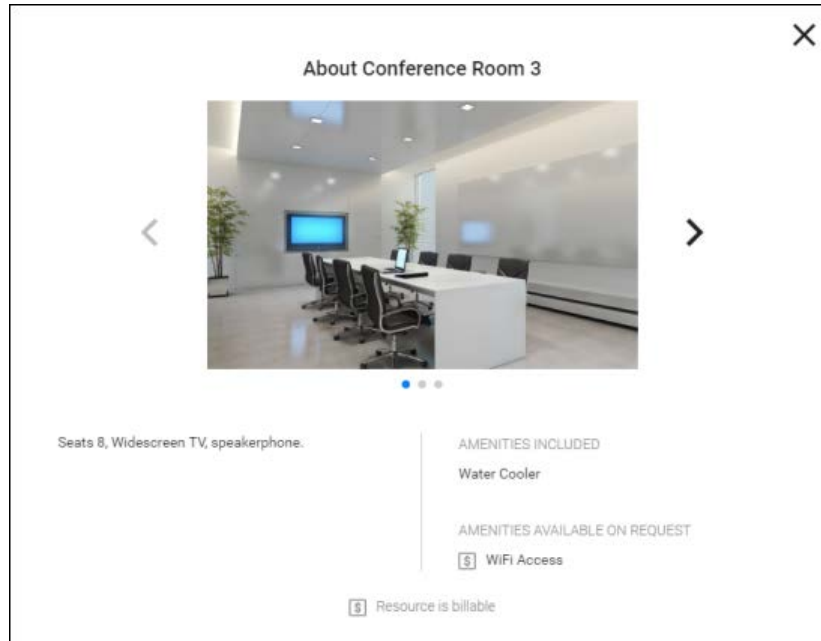


This topic only applies to panels that are in **reservation mode**. For a feature overview of a panel that is in **display mode**, see [The Meeting Room Panel Interface \(Display Mode\)](#).

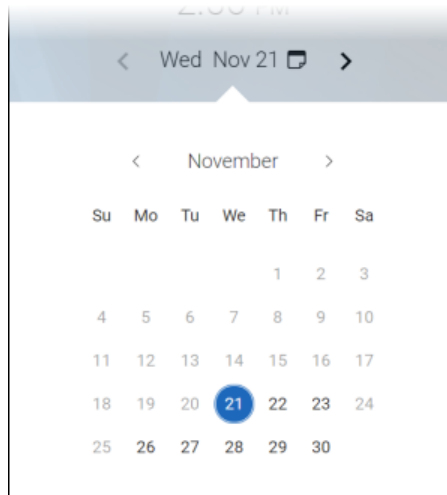
An overview of the Meeting Room Panel's functions and options are detailed below.



1. This area indicates the current status of the meeting room: Available, Reserved, In Progress, or Unavailable.
 - **Available** means the room is immediately available for use (if a reservation is made).
 - **Reserved** indicates that the room is currently reserved, but the meeting has not been started.
 - **In Progress** means the room is currently reserved and the meeting is in progress.
 - **Unavailable** indicates that the room is not in use or reserved, but is unavailable for a reservation at this time.
2. Tapping the info icon (i) displays information about the resource that may include: A description, available amenities (included, or available on request), and a photo gallery.
 - Any amenities listed will indicate if they are **Included** or **Available on Request**. Amenities that will incur a service charge are marked as **Billable** (\$).
 - If more than one image is provided, you can switch between pictures by tapping the **Previous** (<) and **Next** (>) arrows, located to either side of the currently displayed image.



3. Depending on how the meeting room is configured and the current status of the meeting room, the following options may be displayed in this area:
 - **Start Early:** Allows your to start your meeting early if the room is currently not in use. Depending on how the room's availability has been configured, this option may not be available. See [Starting a Meeting Early](#) for additional details.
 - **Start Meeting:** This button appears at the appointed start time for your meeting. Tap this option to start your meeting. See [Starting a Meeting](#) for additional details.
 - **End Meeting:** This option appears 15 minutes after a meeting has started. Tap this button to end your meeting. See [Ending a Meeting](#) for additional details.
 - **Extend Meeting:** If there are no reservations after your meeting end-time, this option will appear, allowing you to extend the duration of your meeting. Depending on how the room's availability has been configured, this option may not be available. See [Extending a Meeting](#) for additional details.
4. To check the availability of the room or make reservations on another day, you can tap on the **Previous** (<) and **Next** (>) arrows located to either side of the date. You can skip ahead to a specific day by tapping on the date, which will display a calendar interface, allowing you to change the displayed month and day (as shown below).



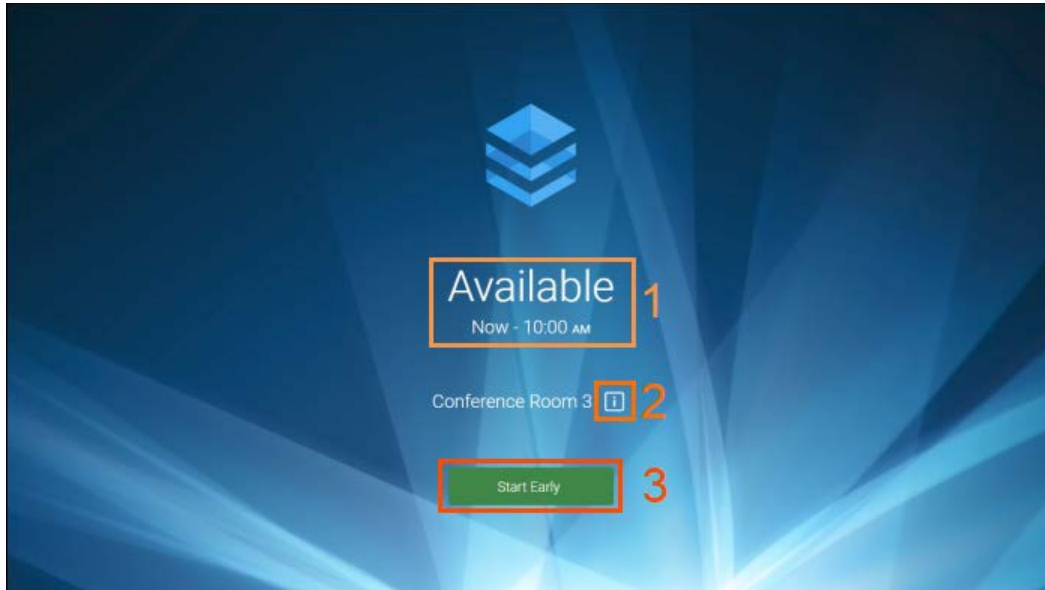
5. Availability for the current day is displayed on the right. Times that have already reserved are displayed with the name of the company that has made the reservation (unless the individual that reserved it has made it anonymous). Available blocks of time are displayed in between those times and are labeled **Tap to reserve**. You do not need to reserve the entire time block that is displayed; you will have the option to select the specific time range you want to reserve during the reservation process. For additional details, see [Making a Reservation](#).

The Meeting Room Panel Interface (Display Mode)

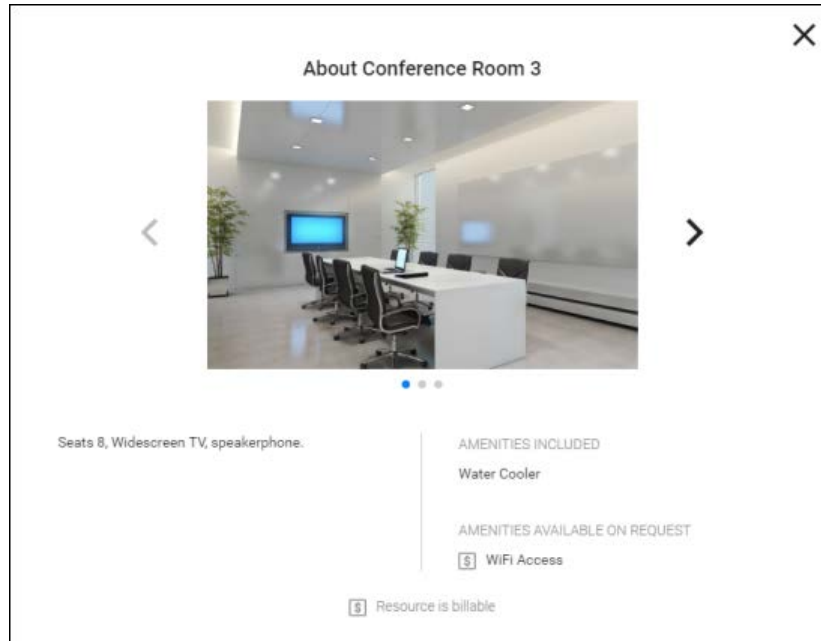


This topic only applies to panels that are in **display mode**. For a feature overview of a panel that is in **reservation mode**, see [The Meeting Room Panel Interface \(Reservation Mode\)](#).

An overview of the Meeting Room Panel's functions and options are detailed below.



1. This area indicates the current status of the meeting room: Available, Reserved, In Progress, or Unavailable.
 - **Available** means the room is immediately available for use (if a reservation is made).
 - **Reserved** indicates that the room is currently reserved, but the meeting has not been started.
 - **In Progress** means the room is currently reserved and the meeting is in progress.
 - **Unavailable** indicates that the room is not in use or reserved, but is unavailable for a reservation at this time.
2. Tapping the info icon (i) displays information about the resource that may include: A description, available amenities (included, or available on request), and a photo gallery.
 - Any amenities listed will indicate if they are **Included** or **Available on Request**. Amenities that will incur a service charge are marked as **Billable** (\$) .
 - If more than one image is provided, you can switch between pictures by tapping the **Previous** (<) and **Next** (>) arrows, located to either side of the currently displayed image.

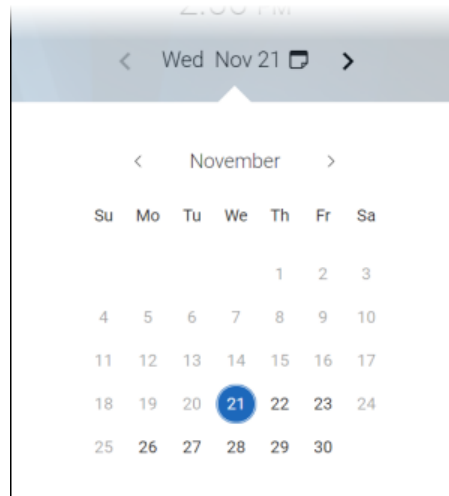


3. Depending on how the meeting room is configured and the current status of the meeting room, the following options may be displayed in this area:
- **Start Early:** Allows your to start your meeting early if the room is currently not in use. Depending on how the room's availability has been configured, this option may not be available. See [Starting a Meeting Early](#) for additional details.
 - **Start Meeting:** This button appears at the appointed start time for your meeting. Tap this option to start your meeting. See [Starting a Meeting](#) for additional details.
 - **End Meeting:** This option appears 15 minutes after a meeting has started. Tap this button to end your meeting. See [Ending a Meeting](#) for additional details.
 - **Extend Meeting:** If there are no reservations after your meeting end-time, this option will appear, allowing you to extend the duration of your meeting. Depending on how the room's availability has been configured, this option may not be available. See [Extending a Meeting](#) for additional details.

Reserving a Meeting Room

To reserve a meeting room, follow the steps below:

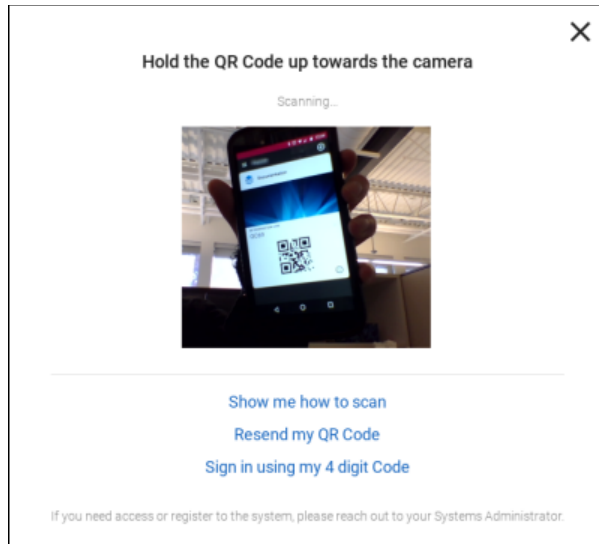
1. Available blocks of time are displayed to the right. By default, the current day's availability is displayed. You can tap on the **Previous** (<) and **Next** (>) arrows located to either side of the date to change what day is displayed. Tapping on the date will display a calendar interface that allows you to change the displayed month and day (as shown below).



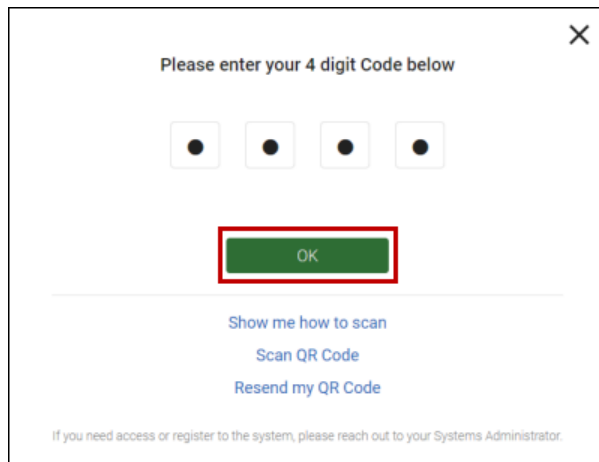
2. Once you have found a block of time that you would like to use for your meeting, press **Tap to Reserve**. During the reservation process you will be able to specify the exact duration of your meeting.



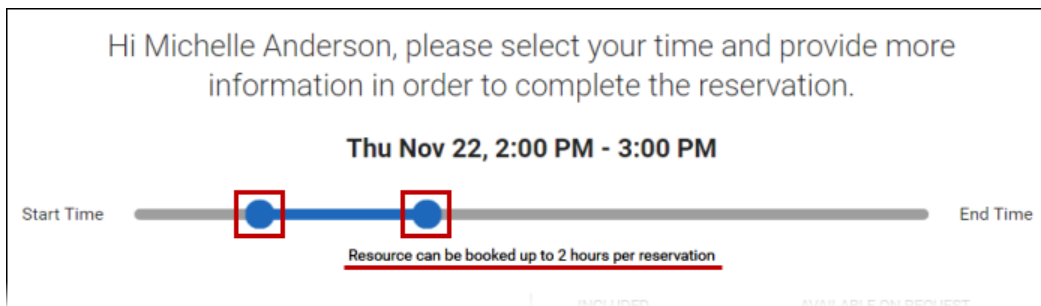
3. You will then be asked to log in. You can use either your provided QR Code or PIN to log in.
 - By default, the Meeting Room Panel will ask you to provide your QR Code; to do this, follow the steps below:
 - On your mobile device, open your reservation email or your smartphone wallet that contains your QR Code.
 - Standing 2-3 feet away from the camera, hold the QR Code up towards the camera to scan. On the panel, you will be able to see if you have positioned the QR Code within the camera's range of view.
 - The camera will scan your QR Code and log you in.



- If you would prefer to use your PIN to log in, tap **Sign in using my 4 digit code**, enter your PIN, and tap **OK**.



4. Use the sliders at the top of the screen to indicate the start and end time for your reservation. The start time cannot be any earlier than the beginning of the time block you selected. The end time cannot be set any later than the end of the available time block. The resource may also restrict the maximum duration of a single reservation; if this is the case, the maximum duration is also displayed below the sliders (as shown below).



5. If there is any additional information that is required for the reservation, fill out the on-screen questions displayed on the left side of the screen.

Resource can be booked up to 2 hours

What seating configuration do you want?
 Conference

How many people will be attending?
 7

Make reservation anonymous on panel


- By default, the name of your company will be displayed on the main screen to indicate who has made the reservation. If you would prefer to not have your company name displayed, you can select **Make reservation anonymous on panel**. Property Management will still be able to see who has made the reservation.
- Any amenities that are included will be displayed to the right. If any optional amenities are available, they are also displayed here and can be selected on the right side of the screen. Note that optional amenities that are marked as **billable** (\$) will incur an additional service fee.

Resource can be booked up to 2 hours per reservation

INCLUDED	AVAILABLE ON REQUEST
Water Cooler	<input checked="" type="checkbox"/> (\$) WiFi Access

RESERVATION NOTES

- Enter any additional **Reservation Notes** in the field provided. This information will be communicated to Property Management.
- When you are finished, tap **Reserve**. In the confirmation popup that appears, you will be given the option to remain logged in, allowing you to make additional reservations, or to log out.

 If the reservation requires approval, then you will be notified on-screen. Reservations that are pending approval will still prevent others from making a reservation for the same period of time. If additional documents need to be downloaded, filled out, and then returned to Property Management, you can retrieve these documents from your **Service Portal** by viewing the reservation's details.

Starting, Ending, or Extending a Meeting



If the Meeting Room Panel is in **Display Mode**, all features still work as described below, except that the right-hand panel will not be displayed.

In addition to being able to start or end a meeting at the scheduled time, you can also end a meeting early. Depending on how the room's availability has been configured, it may also be possible to start a meeting early, or extend it.

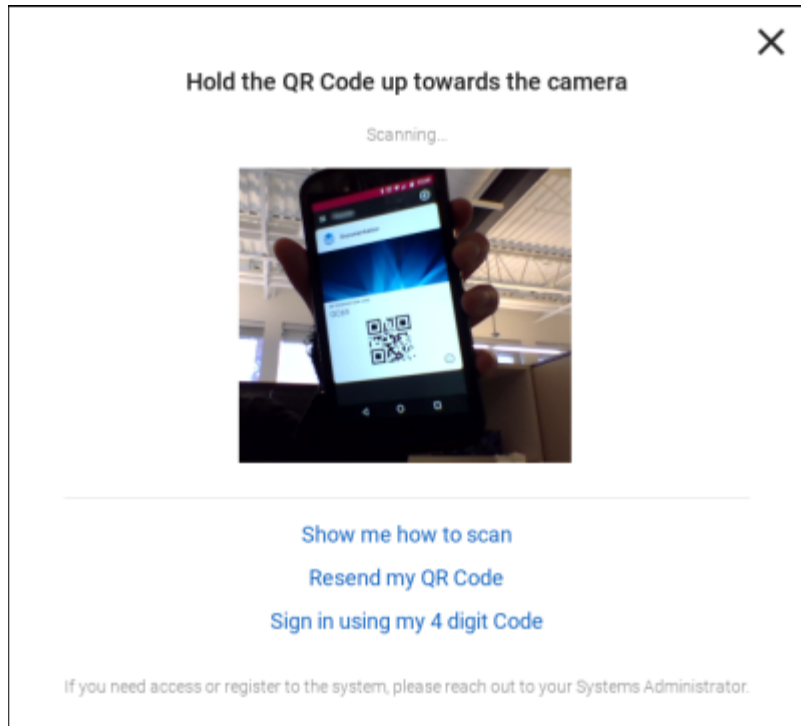
Starting a Meeting

Your meeting can begin any time after its scheduled start time. Follow the steps below to start your meeting:

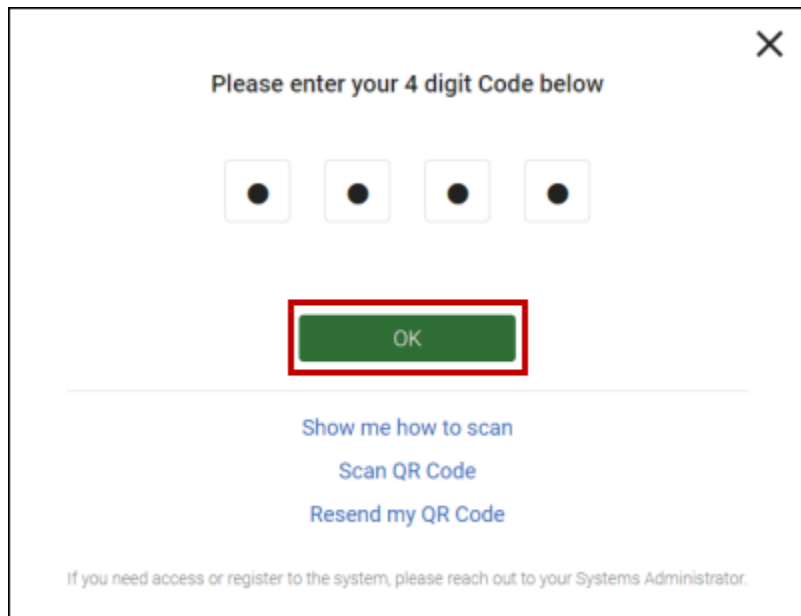
1. Tap **Start Meeting**.



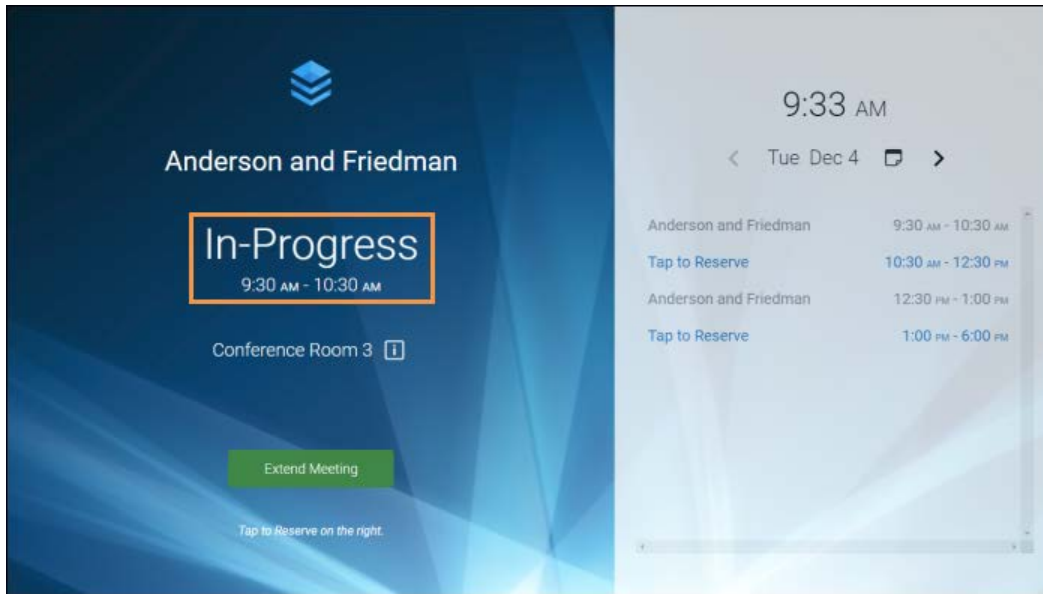
2. Use your [QR Code](#) or [PIN](#) to log in.
 - By default, the Meeting Room Panel will ask you to provide your QR Code; to do this, follow the steps below:
 - On your mobile device, open your reservation email or your smartphone wallet that contains your QR Code.
 - Standing 2-3 feet away from the camera, hold the QR Code up towards the camera to scan. On the panel, you will be able to see if you have positioned the QR Code within the camera's range of view.
 - The camera will scan your QR Code and log you in.



- If you would prefer to use your PIN to log in, tap **Sign in using my 4 digit code**, enter your PIN, and tap **OK**.



3. The panel will now indicate that the reservation is **In Progress**.



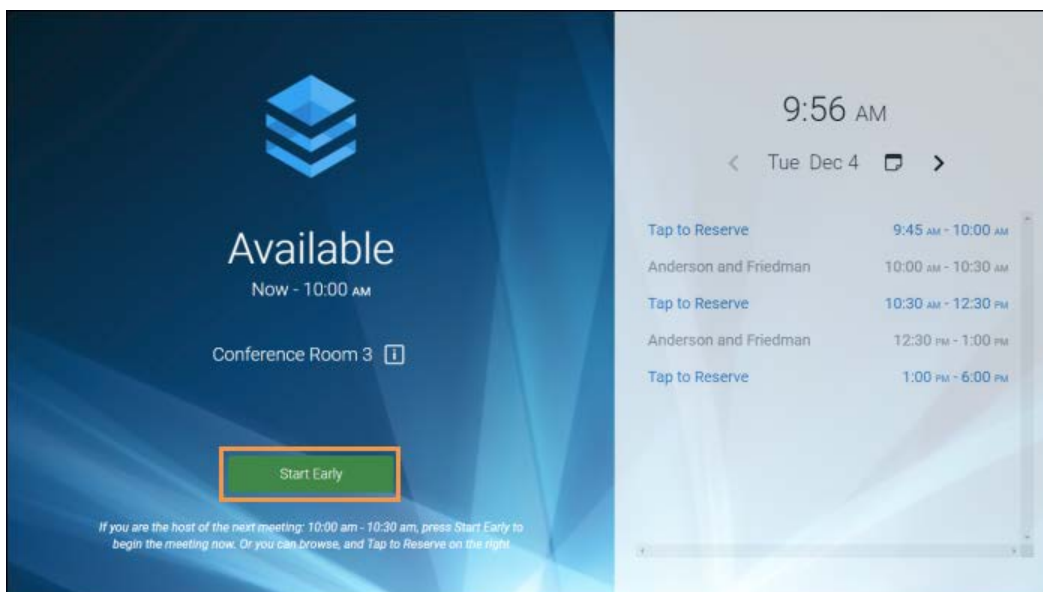
Starting a Meeting Early



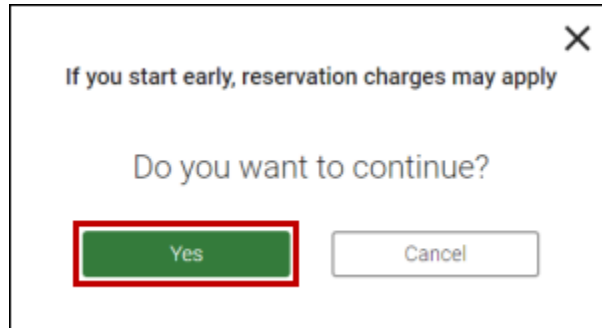
Depending on how the meeting room's availability is configured, the option to start a meeting early may not be available.

To start a meeting early, follow the steps below:

1. If the meeting room is available before the scheduled start time of your meeting, a **Start Early** button will be displayed on the panel. Tap **Start Early**.

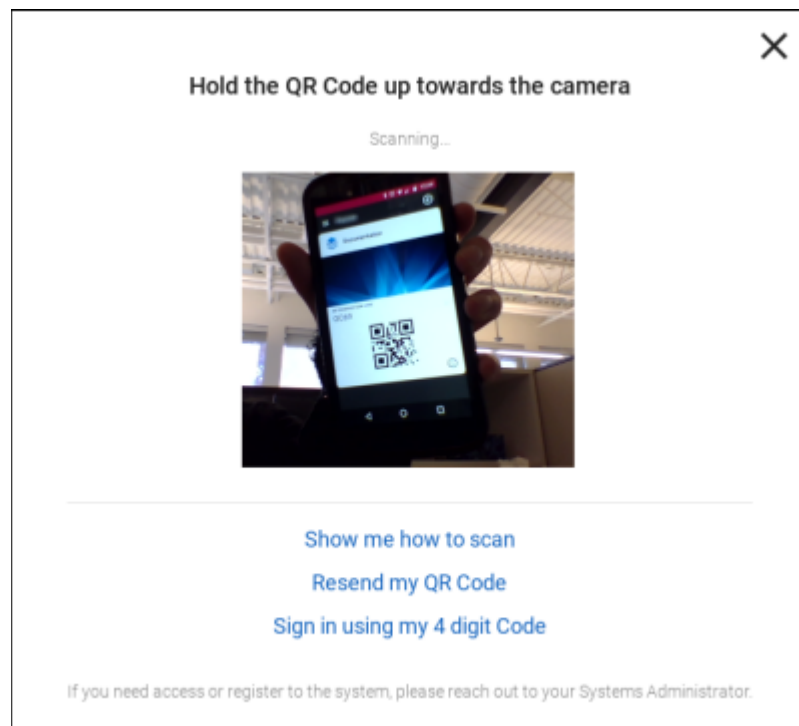


2. If the room is billable or has billable amenities, a confirmation popup will appear, notifying you that additional reservation charges may apply. To proceed, select **Yes**.

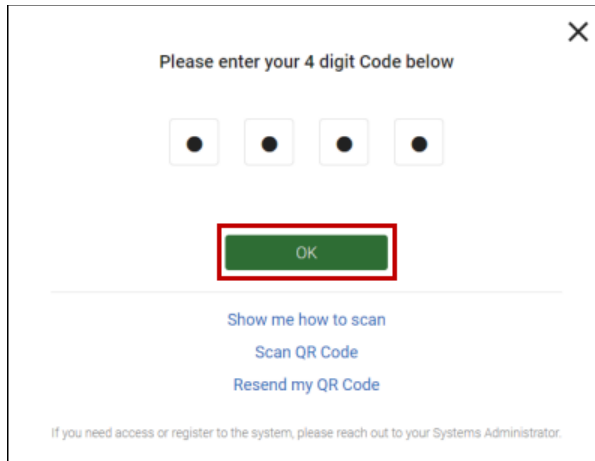


3. Use your [QR Code](#) or [PIN](#) to log in.

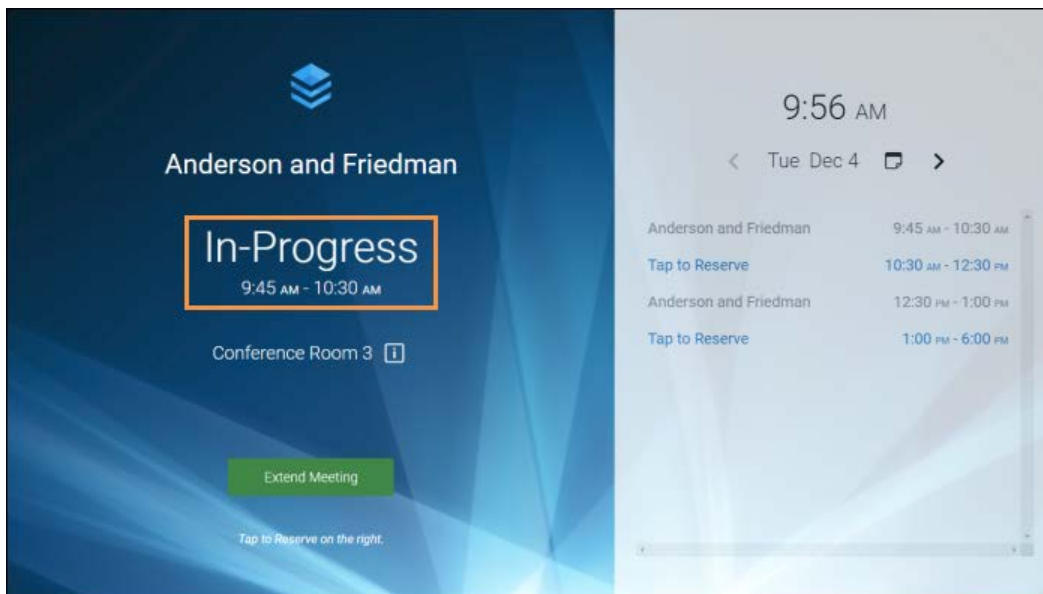
- By default, the Meeting Room Panel will ask you to provide your QR Code; to do this, follow the steps below:
 - On your mobile device, open your reservation email or your smartphone wallet that contains your QR Code.
 - Standing 2-3 feet away from the camera, hold the QR Code up towards the camera to scan. On the panel, you will be able to see if you have positioned the QR Code within the camera's range of view.
 - The camera will scan your QR Code and log you in.



- If you would prefer to use your PIN to log in, tap **Sign in using my 4 digit code**, enter your PIN, and tap **OK**.



3. The panel will now indicate that your meeting is **In Progress**.



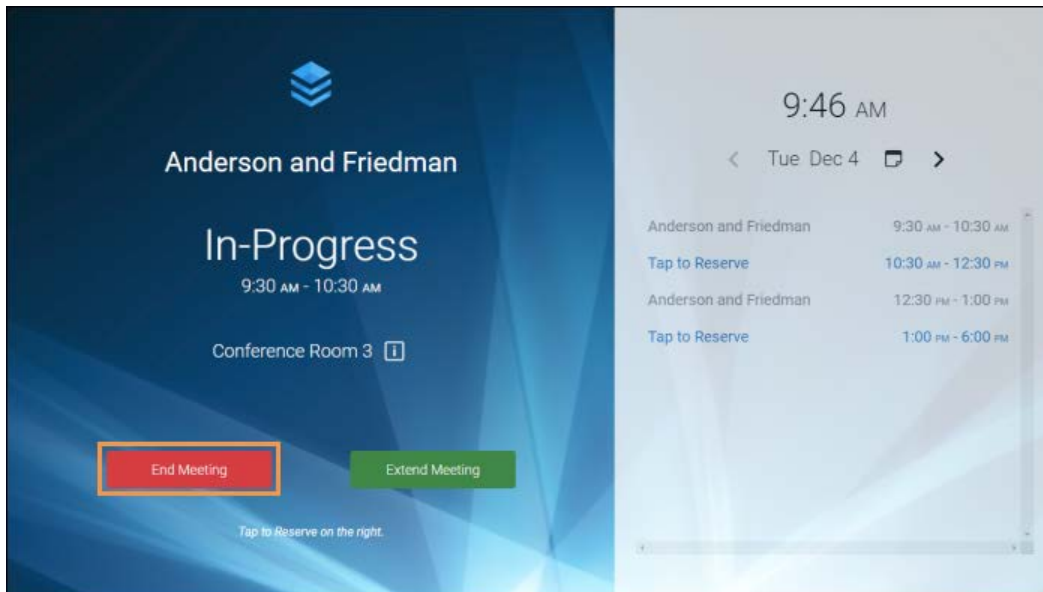
Ending a Meeting



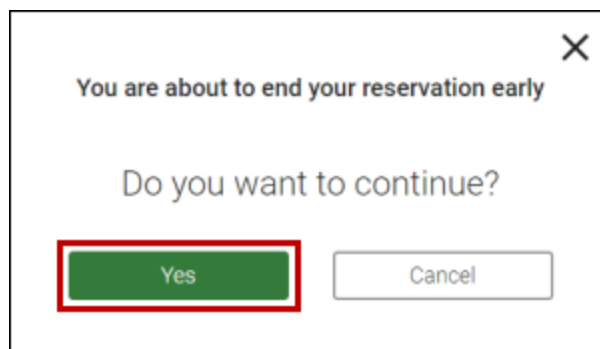
Depending on the duration of your meeting, it may take up to 15 minutes before this option is displayed. If you do not manually end your meeting, the panel will automatically end your meeting at the scheduled time.

To end a meeting:

1. Tap **End Meeting**.



2. On the confirmation popup, select **Yes**.



3. Your meeting has now been ended. Depending on how the meeting room's availability has been configured, it will now be displayed as either **Available** or **Unavailable** on the panel.

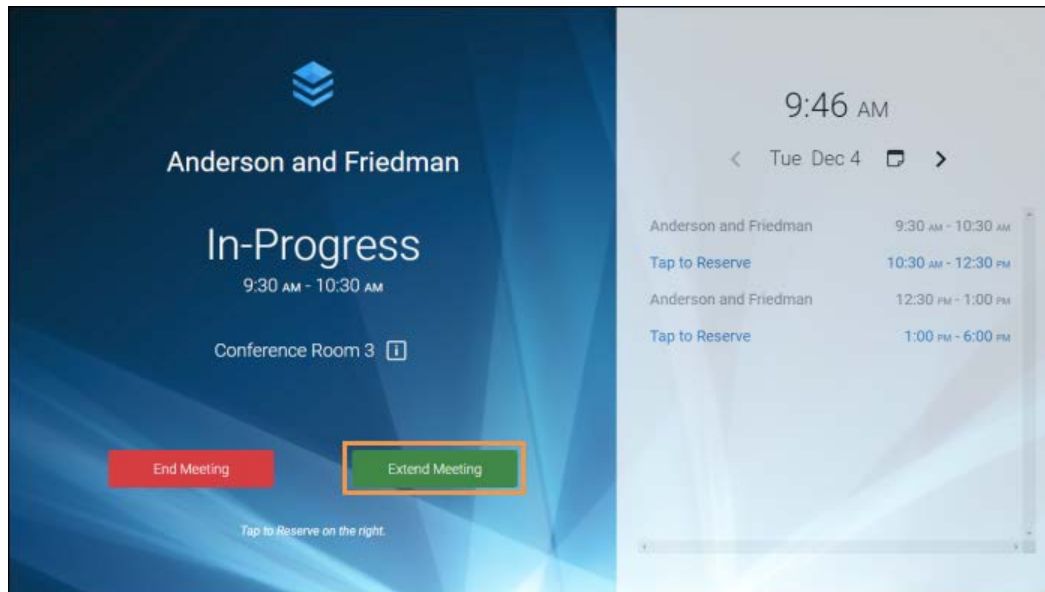
Extending a Meeting



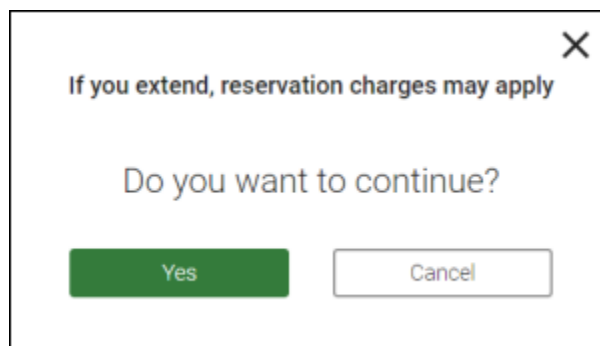
Depending on how the meeting room's availability is configured, the option to extend a meeting may not be available.

If the meeting room is available after the scheduled end time for your meeting, you can extend an in-progress meeting at any time as follows:

1. Tap **Extend Meeting**.

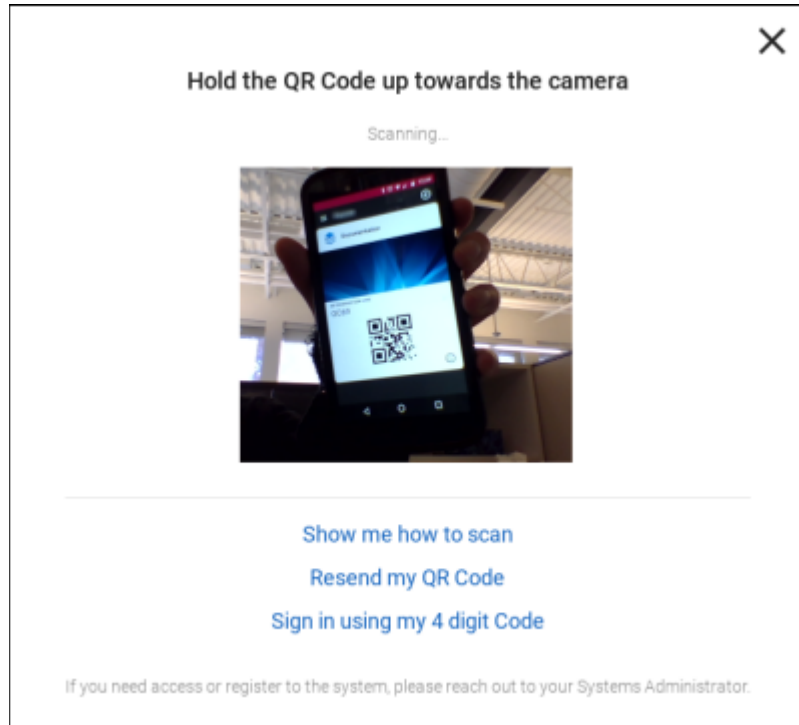


2. If the meeting room is billable or has billable amenities, a confirmation popup will appear, notifying you that additional reservation charges may apply. To proceed, select **Yes**.

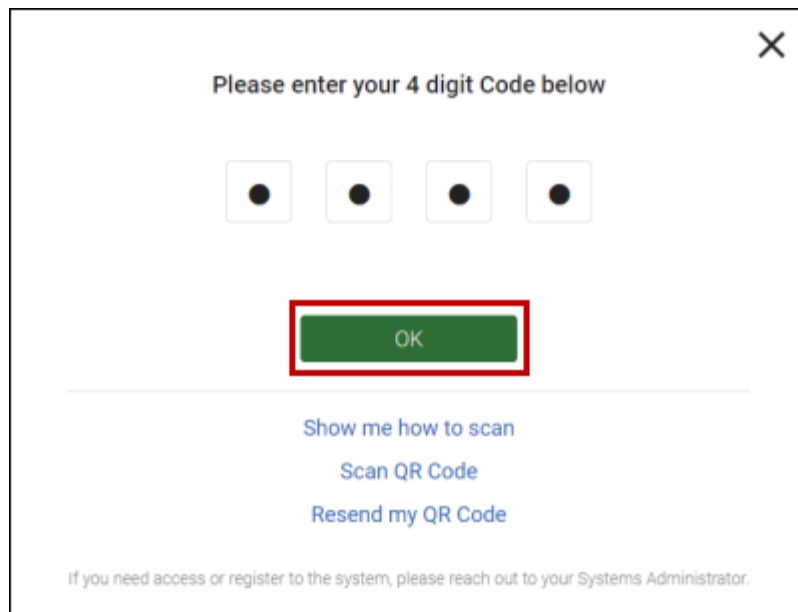


3. Use your QR Code or PIN to log in.
 - By default, the Meeting Room Panel will ask you to provide your QR Code; to do this, follow the steps below:
 - On your mobile device, open your reservation email or your smartphone wallet that contains your QR Code.

- Standing 2-3 feet away from the camera, hold the QR Code up towards the camera to scan. On the panel, you will be able to see if you have positioned the QR Code within the camera's range of view.
- The camera will scan your QR Code and log you in.



- If you would prefer to use your PIN to log in, tap **Sign in using my 4 digit code**, enter your PIN, and tap **OK**.



- Using the provided slider, select the new end time for your meeting, then tap **Reserve**.

Hi Michelle Anderson, please select your time and provide more information in order to complete the reservation.

9:30 AM - 11:15 AM

Start Time Extended End Time

- Your meeting is now extended. In the confirmation popup that appears, you will be given the option to remain logged in, allowing you to make additional reservations, or to log out.

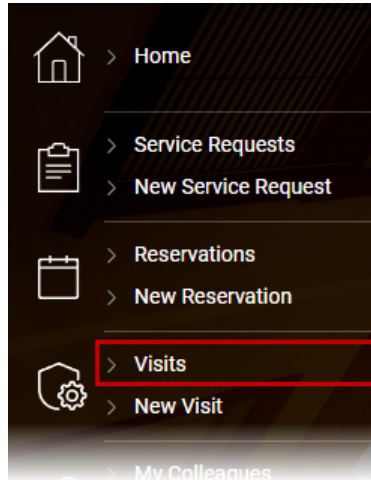
Michelle Anderson, your room is now reserved for
Dec 4, 9:30 AM - 11:15 AM

Do you want to make another reservation?

Visitor Security

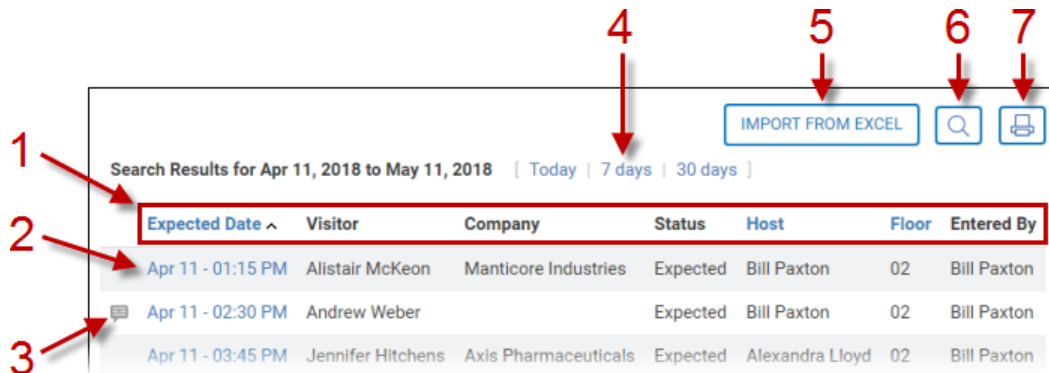
The Visitor Security List

Through the Visitor Security list you can view and search through visits that have been entered, update their details, and enter new visits. To access the list, click on **Visits** in the navigation menu (☰ MENU).



An overview of the visitor security list and its functions are detailed below.





i By default, the system displays the current day's visits. You can override this setting and configure additional filtering options by clicking on the **Search** button, as described in [section 6](#), below.

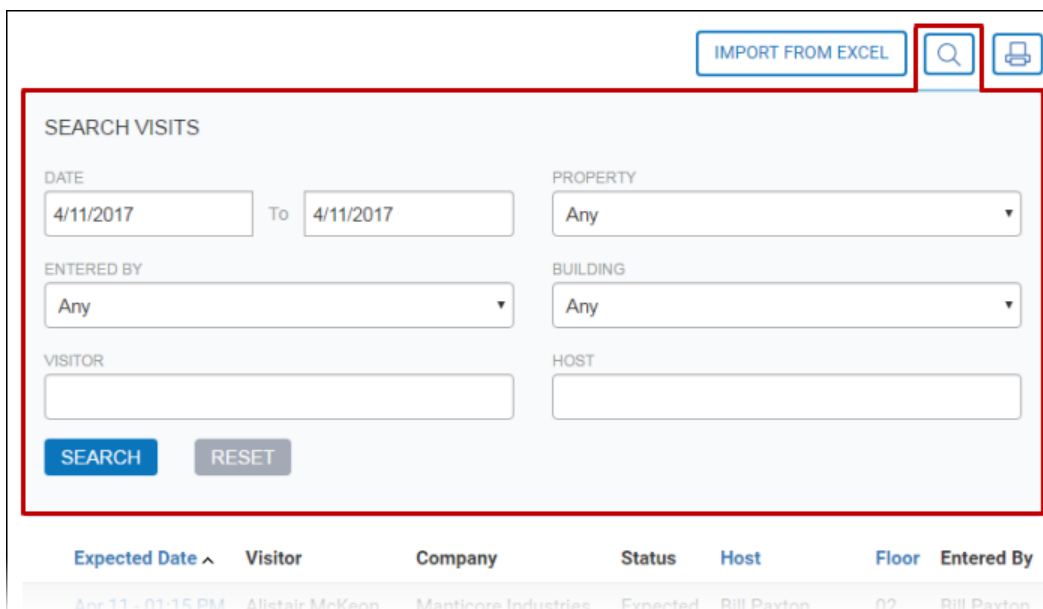




1. By default, the list is sorted by Expected Date. You can sort the list in ascending or descending order by clicking on the following headings:
 - Expected Date
 - Host
 - Floor



It is important to note that the individual who created the visit (**Entered By**) may be different from the **Host**.

- You can view a visit's details by clicking on the expected date, or by double-clicking on the row. You can also edit or cancel a visit while viewing a visit's details. See [The Visit Details Screen](#) topic for additional information.
 - If the visitors will be issued **single use** badges, then the visit will be marked with a **single use badge** icon next to the date and time (). Single use badges are automatically disabled after the first time they are used at a security scanner.
 - If the visitors will be issued badges that have had the **allow entry until** feature enabled, then the arrival time is replaced with a time range that indicates the range of time that the the security badges will be active for.
- You can review any notes attached to the visit by clicking the **Note** icon (). Notes are also displayed and can be edited from the [Visit Details](#) screen.
- The list is configured to displayed visits within a specified date range. By default, visits are displayed for the next month (30 days). You can use the quick links to conveniently switch between **Today**, **7 days**, and **30 days**. The most recently selected quick link is remembered between login sessions. Additional date and filtering options are also accessible from the **Search** button () as described in [\(6\)](#) below.
- Click **Import From Excel** to upload visits from a list that you have created. This list must be saved as a Microsoft Excel Spreadsheet (XLS) file. You can download a template for the list from within the Import Visitors interface, as described in [Importing a Visitor List](#).
- Click the **Search** button () to view additional filtering options, as detailed below.



IMPORT FROM EXCEL  


SEARCH VISITS

DATE: To PROPERTY:

ENTERED BY: BUILDING:

VISITOR: HOST:

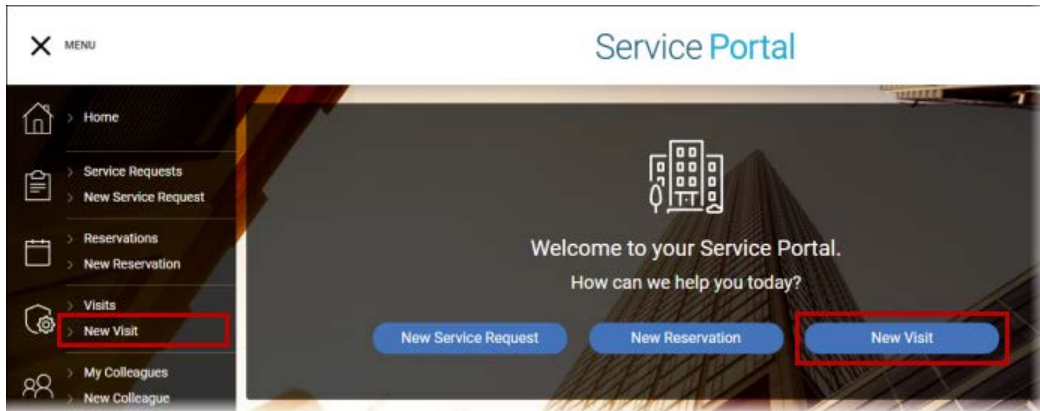
Expected Date ^	Visitor	Company	Status	Host	Floor	Entered By
Apr 11 - 01:15 PM	Alistair McKeon	Manticore Industries	Expected	Bill Paxton	02	Bill Paxton

- Use the dropdown menus to filter the list by Date.
 - If you have access to view your colleagues' reservations, you will also see an **Entered By** dropdown.
 - If you have access to multiple properties and buildings, you will see **Property** and **Building** dropdown lists.
 - You can also enter the name of a visitor and/or the host (the person who will be receiving the visitors).
7. You can print the currently displayed list by clicking the **Print** () button.

Entering a New Visit

Visitor Security enables you to pre-register your visitors using the Service Portal. This feature ensures visitors are quickly processed and promotes building security.

To enter a visitor into the system, click **New Visit** from the navigation menu (☰ MENU), or click the **New Visit** quick link from the Home page. This will open the New Service Request screen.



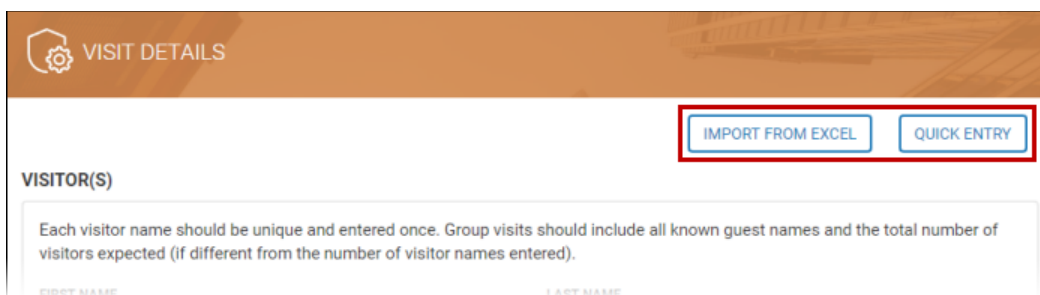
There are two methods for manually entering a visit's details: Form Entry (default), and Quick Entry. You can also import a visitor list from an excel spreadsheet. If you have a list of names that you would like to copy and paste, click the **Quick Entry** link. This will change the **Visitors** section of the interface to a unified field where you can paste the visitor's name, company and email address in a single line. For additional details, see Entering a Visit with Quick Entry.

Follow the steps below to enter a new visit:



The company name and email address fields are **optional**. If you do not have information for these fields or do not want to include this information, leave these fields blank.

1. The **Visitors** section of the Visit details screen is used to enter information about the people who are expected to arrive. There are two methods for manually entering a visit's details: **Form Entry** (default), and **Quick Entry**. You can switch between these modes by clicking on the **Quick Entry/Form Entry** button in the top-right corner. If you would prefer to import a list of visitors from an Excel spreadsheet, you can instead select **Import From Excel**.



Refer to the subsections below for instructions on filling in this section in each mode.

Form Entry (Default)

[QUICK ENTRY](#)

VISITOR(S)

Each visitor name should be unique and entered once. Group visits should include all guest names OR one primary visitor with a number of guests accompanying them

FIRST NAME	LAST NAME
<input type="text" value="Alistair"/>	<input type="text" value="McKeon"/>
COMPANY	EMAIL
<input type="text" value="Manticore Industries"/>	<input type="text" value="amckeon@manty.xom"/>

[Add](#)

First Name	Last Name	Company	Email	
Daniel	Samson	Manticore Industries	dsamson@manty.xom	Edit Remove

GROUP SIZE:

- Enter the First and Last name, affiliated company and email address (if applicable) for each individual that will be visiting, or enter the details for the primary visitor, and use the **Group Size** field to indicate to total size of the group that will be visiting (*including* the primary visitor)
 - If the **Group Size** field is skipped, it will be automatically determined based on the number of visitors that are entered.
- After entering the details for each visitor, click **Add**.
- When entering the first name of a visitor, possible matches (based on previous visitors already entered into the system) are displayed in a dropdown menu, allowing you to more rapidly enter visitor information for people who have visited before.
- You can edit or delete a visitor that you have added by clicking the associated **Edit** or **Remove** links.

Quick Entry

FORM ENTRY

VISITOR(S)

Each visitor name should be unique and entered once. Group visits should include all guest names OR one primary visitor with a number of guests accompanying them

Enter each visitor on a separate line in the format of Visitor Name (first name and last name), Company (optional), Email (optional). Do not enter commas as part of the Visitor Name or Company Name. Example: John Smith, ABC Company, jsmith@abc.com or John Smith, jsmith@abc.com

Daniel Samson, Manticore Industries, dsamson@manty.xom
Alistair McKeon, Manticore Industries, amckeon@manty.xom

GROUP SIZE:

TIME & LOCATION

- Enter each visitor's information on a new line in the field provided (either by copying and pasting, or by manually typing the information). Each visitor must have information entered in the following format (including commas): *First and Last name, Company Name, Email Address*. E.g. John Smith, ABC Company, jsmith@abc.com
 - A first and last name must be provided. You can omit the company name and/or the email address; however, if an email address is not provided, then the visitor will not be able to use the [Self Check-In](#) process if it is available in your building.
- You can also enter the size of the group that is visiting in the **Group Size** field. If this field is skipped, it will be automatically determined based on the number of visitors that are entered.

If you choose to import a list of visitors from an Excel spreadsheet, click **Import From Excel** and refer to the [Importing a Visitor List](#) topic.

2. The **Time & Location** section is used to indicate when and where the visit will be taking place. In addition to the default **Single Visit** option, depending on what features have been enabled for your property, one of the following visit types will also be available:
 - **Recurring Visit:** visitors will be returning on a regular schedule for a specific time interval, e.g. Wednesdays and Fridays at 9AM, April 12-28, 2017).
 - **Multiday Pass:** visitors have access to the building between the specified start and end dates, e.g. April 12-28, 2017).

The option to create either a Recurring Visit or Multiday Pass is displayed as a link in the top-left corner of the **Date & Location** section (as shown below).

Properties using the **Recurring Visit** option

TIME & LOCATION

RECURRING VISIT

DATE

4/12/2017

TIME:

Properties using the **Multiday Pass** option

TIME & LOCATION

MULTIDAY PASS

DATE

4/12/2017

TIME:

Refer to the subsections below for instructions on filling in this section in each mode.

Single Visit (Default)

- For a one-time visit, enter the **Date**, **Time**, **Floor** and **Suite**.
 - If you have access to multiple buildings, you will need to select one by using the **Building** dropdown list provided.
 - If you have access to multiple properties, you will also need to select one by using the **Property** dropdown list provided.
 - If your building uses the **Allow Entry Until** feature, you can set a specific time after which the visitor's badge will no longer be active using the provided field. If you do not set a time, or if you do not have this feature, visitor badges are active until the end of the day.
 - If your building uses the **Single Use Badge** feature, enabling this option will cause the visitor's badge to be disabled after the first time it has been used at a security scanner.

TIME & LOCATION

RECURRING VISIT

DATE

4/12/2017

TIME:

02: 30 PM

ALLOW ENTRY UNTIL

01: 15 PM

SINGLE USE BADGE

PROPERTY

Mackillop Property

Recurring Visit

- Click the **Recurring Visit** link. The recurring visit section is displayed in place of the single visit interface (shown below).

TIME & LOCATION

SINGLE VISIT

START DATE

4/12/2017

TIME: ALLOW ENTRY UNTIL

03: ▾ 15 ▾ PM ▾ 01: ▾ 15 ▾ PM ▾ SINGLE USE BADGE

END DATE

04/26/2017

DAYS:

Sun Mon Tue Wed Thu Fri Sat

PROPERTY

Mackillop Property ▾

BUILDING

Mackillop Building A ▾

FLOOR

02 ▾

SUITE

202 ▾

HOST

- Enter the start date, end date, floor, time, days of the week, and suite number.
 - If you have access to multiple buildings, you will need to select one by using the **Building** dropdown list provided.
 - If you have access to multiple properties, you will also need to select one by using the **Property** dropdown list provided.
 - If your building uses the **Allow Entry Until** feature, you can set a specific time after which the visitor's badge will no longer be active using the provided field. If you do not set a time, or if you do not have this feature, visitor badges are active until the end of the day.

- If your building uses the **Single Use Badge** feature, enabling this option will cause the visitor's badge to be disabled after the first time it has been used at a security scanner.

Multiday Pass

- Click the **Multiday Pass** link. The recurring visit section is displayed in place of the single visit interface (shown below).

The screenshot shows a form titled "TIME & LOCATION" with a "SINGLE VISIT" link. The form contains the following fields:

- START DATE:** A text input field containing "4/12/2017".
- TIME:** A time selection interface with three dropdown menus: "03:", "15", and "PM".
- END DATE:** A text input field containing "04/26/2017".
- FLOOR:** A dropdown menu with "2" selected.
- SUITE:** A dropdown menu with "202" selected.

Below the form, the word "HOST" is partially visible.

- Enter the start date, end date, floor, time, and suite number.
 - If you have access to multiple buildings, you will need to select one by using the **Building** dropdown list provided.
 - If you have access to multiple properties, you will also need to select one by using the **Property** dropdown list provided.

After entering in the appropriate day/time information for your single visit, multiday pass, or recurring visit, continue with the steps below:

3. The **Host** section is used to indicate who will be receiving the visitor(s). By default, this is set to the person entering the visit. You can select a different host using the dropdown list provided.

HOST

NAME

Bill Paxton ▼

Not finding who you are looking for?

GENERAL

- If the host does not have an entry in the dropdown menu, place a checkmark beside **Not finding who you are looking for?** and manually enter a name and phone number for the host in the fields provided.

Not finding who you are looking for?

NAME

Ellen Harris

PHONE

414-555-1212

GENERAL

- The **General** section is used to provide notification email addresses and any additional notes concerning the visit.
 - **Send an email when the visitor(s) are checked-in** is selected by default. Enter the host's email address if one has not already been entered. For multiple email addresses, enter each additional address on a new line. If you do not want to receive email notifications for this visit, uncheck this option.
 - Enter any additional important information concerning the visit in the **Notes** field.

GENERAL

Send an email when the visitor(s) are checked-in

NOTIFICATION BY EMAIL (ENTER EACH EMAIL ADDRESS IN A SEPARATE LINE)

NOTES

bpaxton@email.xom

SAVE RETURN TO LIST

5. When you are finished, click **Save**. After saving, you will be shown a summary of the visit you have entered. At the bottom of this screen, you can click **Submit Another Visit** if you have more visits to create, or click **Done** to return to the Visitor Security list.

The Visit Details Screen

Visit details are accessed from the [Visitor Security list](#). From the Visit Details screen, you can do the following:

- Review visit details
- Edit visit details (if the visit is in the future).
- Cancel a visit, or cancel one or more recurring visits

A breakdown of each section of the details screen and the various editing options available are provided below.



- Once the visit's date and time has passed, or after visitors have been checked in, the visit details can no longer be edited. A more compact, uneditable summary of the visit is displayed in these circumstances.
- When editing a **Recurring Visit**, any changes you make will only apply to the currently displayed visit.
- **Multiday Pass** visits can be canceled from this screen, but cannot be edited.

1

VISITOR(S)

Each visitor name should be unique and entered once. Group visits should include all guest names OR one primary visitor with a number of guests accompanying them

FIRST NAME	LAST NAME
<input type="text"/>	<input type="text"/>
COMPANY	EMAIL
<input type="text"/>	<input type="text"/>

[Add](#)

First Name	Last Name	Company	Email	Status	Checked In Date	
Daniel	Samson	Manticore Industries	dsamson@manty.xom	Expected		Edit Remove
Alistair	McKeon	Manticore Industries	amckeon@manty.xom	Expected		Edit Remove

GROUP SIZE:

TIME & LOCATION

2

TIME & LOCATION

DATE
4/17/2017

TIME: 04: 00 PM ALLOW ENTRY UNTIL 01: 15 PM SINGLE USE BADGE

PROPERTY
Mackillop Property

BUILDING
Mackillop Building A

FLOOR
02

SUITE
202

HOST

NAME
Bill Paxton

Not finding who you are looking for?

GENERAL

Send an email when the visitor(s) are checked-in
NOTIFICATION BY EMAIL (ENTER EACH EMAIL ADDRESS IN A SEPARATE LINE)

bpaxton@email.xom

NOTES

5 → **SAVE** CANCEL VISIT RETURN

1. The **Visitors** section displays all visitor information that was entered. In this section, you can review, edit, add or remove expected visitors using the **Form Entry** interface as outlined in [Entering a New Visit](#).
 - To add another visitor:

- If you are entering the names of all visitors, enter the First Name, Last Name, affiliated company and email address (if applicable) for the new individual that will be visiting, then click **Add**. The **Group Size** field will automatically update after saving your changes.
- If you have only entered the details for the Primary visitor, simply update the **Group Size** to reflect the new total size of the group.
- When entering the first name of a visitor, possible matches (based on previous visitors already entered into the system) are displayed in a dropdown menu, allowing you to quickly enter visitor information for people who have visited before.
- You can edit or delete a visitor that you have added by clicking the associated **Edit** or **Remove** links.

VISITOR(S)

Each visitor name should be unique and entered once. Group visits should include all guest names OR one primary visitor with a number of guests accompanying them

FIRST NAME: Alistair

LAST NAME: McKeon

COMPANY: Manticore Industries

EMAIL: amckeon@manty.xom

Add

First Name	Last Name	Company	Email	
Daniel	Samson	Manticore Industries	dsamson@manty.xom	Edit Remove

GROUP SIZE:

TIME & LOCATION

2. The **Time and Location** section allows you to update the time and specific location for the upcoming visit.
 - From here, you can update the **Date**, **Time**, **Floor** and **Suite** using the dropdown lists provided.
 - If you have access to multiple buildings, you can also update the **Building** where the visit will occur.
 - If you have access to multiple properties, you can also update the **Property**.

- If your building uses the **Allow Entry Until** feature, you can set a specific time after which the visitor's badge will no longer be active using the provided field. If you do not set a time, or if you do not have this feature, visitor badges are active until the end of the day.
- If your building uses the **Single Use Badge** feature, enabling this option will cause the visitor's badge to be disabled after the first time it has been used at a security scanner.

TIME & LOCATION

RECURRING VISIT

DATE
4/12/2017

TIME: ALLOW ENTRY UNTIL

02: ▾ 30 ▾ PM ▾ 01: ▾ 15 ▾ PM ▾ SINGLE USE BADGE

PROPERTY
Mackillop Property ▾

BUILDING
Mackillop Building A ▾

FLOOR
02 ▾

SUITE
201 ▾

HOST

3. You can review and update who will be receiving the visitors in the **Host** section. By default, this is set to the person entering the visit. You can select a different host using the dropdown list provided.

HOST

NAME

Bill Paxton ▼

Not finding who you are looking for?

GENERAL

- If the host does not have an entry in the dropdown menu, place a checkmark beside **Not finding who you are looking for?** and manually enter a name and phone number for the host in the fields provided.

Not finding who you are looking for?

NAME

Ellen Harris

PHONE

414-555-1212

GENERAL

4. Use the **General** section to review and update notification email addresses and add or revise any additional notes concerning the visit.
 - You can check or uncheck **Send an email when the visitor(s) are checked-in** to indicate if the host(s) should receive a notification when the visitors arrive. For multiple email addresses, enter each additional address on a new line.
 - Enter or revise any additional important information concerning the visit in the **Notes** field.

GENERAL

Send an email when the visitor(s) are checked-in

NOTIFICATION BY EMAIL (ENTER EACH EMAIL ADDRESS IN A SEPARATE LINE)

NOTES

bpaxton@email.xom

5. After viewing or updating the visit's details, the following options are available at the bottom of the screen:

- **Save:** save your changes.
- **Cancel Visit:** permanently remove the visit from the list. If this is a recurring visit, this option cancels the **currently displayed** visit only all other visits in the series are unaffected.
- **Cancel All Visits:** this option is only displayed for recurring visits. This will permanently remove **all upcoming visits** in the series. Past visits in the series are unaffected.
- **Return to List:** ignores any changes you may have made and returns you to the [Visitor Security list](#).

SAVE CANCEL VISIT CANCEL ALL VISITS RETURN

Importing a Visit List



To ensure that your spreadsheet is up-to-date and supports all available visitor options and features, please ensure that you always download the spreadsheet from the provided link (as described in Step 2, below) before creating a new visitor list. Using an out-of-date spreadsheet format can prevent the successful import of visitor lists.

If you have a large number of visits to enter, you can upload visits from a spreadsheet by clicking **Import From Excel**. This list must be in a specific format, and also must be saved as a Microsoft Excel Spreadsheet (.xls) file.

Expected Date ^	Visitor	Company	Status	Host	Floor	Entered By
Apr 17 - 04:00 PM	Daniel Samson	Manticore Industries	Expected	Bill Paxton	02	Bill Paxton

You can download a template for the list from within the Import Visitors interface, as described below:

1. Under **Step One**, select the building and floor for the visits that will be imported. You can optionally specify the suite.

Step One: Select the Visit's Location

BUILDING: Mackillop Building A

FLOOR: 02

SUITE: 201

Step Two: Download the Import Template

2. Use **Step Two** to download a sample template for the visitor import list by clicking **Download Import Template**. This will download a file to your computer that is in the XLS (Microsoft Excel Spreadsheet) format. If you already have a copy of the **current version** of this template, you do not need to download the file again.
 - XLS files can be read by a variety of spreadsheet programs; however, to ensure the best compatibility and prevent issues that can be introduced by format conversions, Microsoft Excel is recommended.
 - Please be aware when saving the file that it must be in XLS format (and *not* XLSX). Use the **Save As...** command in Microsoft Excel to ensure the correct file format is selected.
 - Additional instructions concerning the format used to enter visitor data is on the first tab of the spreadsheet. Please carefully read and follow all instructions provided by the spreadsheet.



Visits on **adjacent rows** in the spreadsheet that have the same **Host**, **Date Expected** and **Time Expected** will be considered a single visit with multiple visitors.

Step Two: Download the Import Template

The upload file should only include each visitor name once. Each visitor name must be unique

[Download Import Template](#)

Step Three: Upload the completed Import File

3. Once you are finished creating the list you want to import, click **Upload File** and locate the file you want to import in the popup window.

[Download Import Template](#)

Step Three: Upload the completed Import File

[Upload File](#)

Step Four: Configure Email Notifications

4. You can enter one or more email addresses which will be used to send notifications for visitor arrivals. You can enter multiple email addresses by entering each additional address on a new line in the field provided. When you are finished, click **Import Visitors**.



If there are any issues with one or more rows of data in your spreadsheet:

- You will receive an error message indicating the row number(s) that failed to import, and the reason for the error.
- To correct this issue in the spreadsheet, correct the identified issues with each affected row, and then remove all rows that were successfully imported. **If you do not remove rows that were already imported, this will cause duplicate visits to be entered into the system.**
- After you have finished updating the spreadsheet and removing rows that were successfully imported, follow the steps above to import the file again.

Step Four: Configure Email Notifications

Send an email when the visitor(s) are checked-in

Notification by email (enter each email address in a separate line)

bpaxton@email.xom

[IMPORT VISITORS](#)

Self Check-In

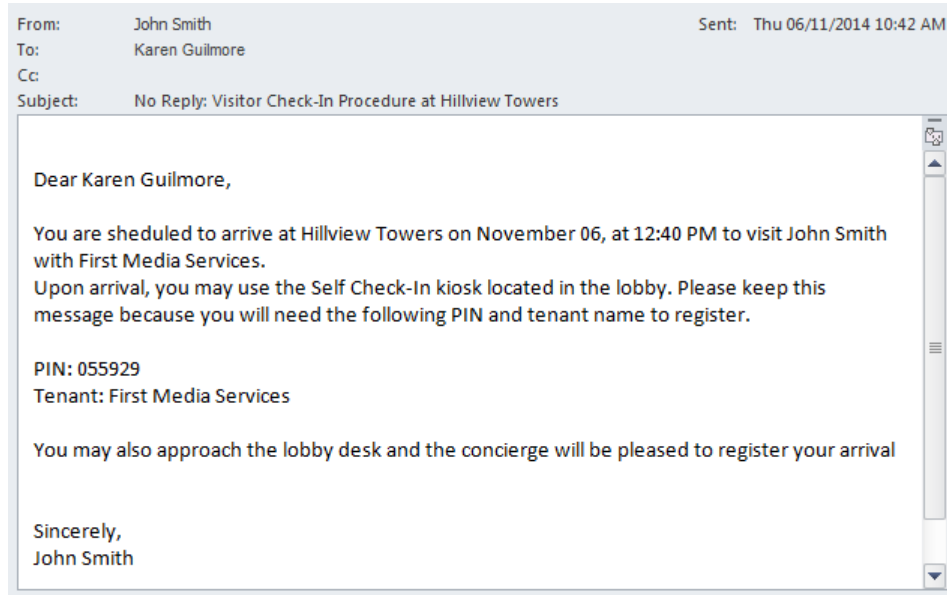
Introduction to Self Check-In

Visitor Self Check-In is a system that allows visitors to use a self-serve kiosk in order to check-in and print a badge. If this system is available in your building, visitors entered with email addresses will be sent PINs in advance of their visits, which are required to use the Self Check-In kiosks.

For more information, see [Self Check-In Email Notifications](#), and [Using Self Check-In](#).

Self Check-In Email Notifications

For buildings that have Self Check-In enabled, whenever a visit is entered into the system that includes the visitor's email address, a notification email is sent which includes the name of the company being visited, and a 6-digit PIN. A sample notification email is shown below.



- Visitors will receive their PINs by email approximately 22 hours before the scheduled visit.
- Visitors that are entered on the same day as the visit will receive their PIN within 5 minutes of being submitted.

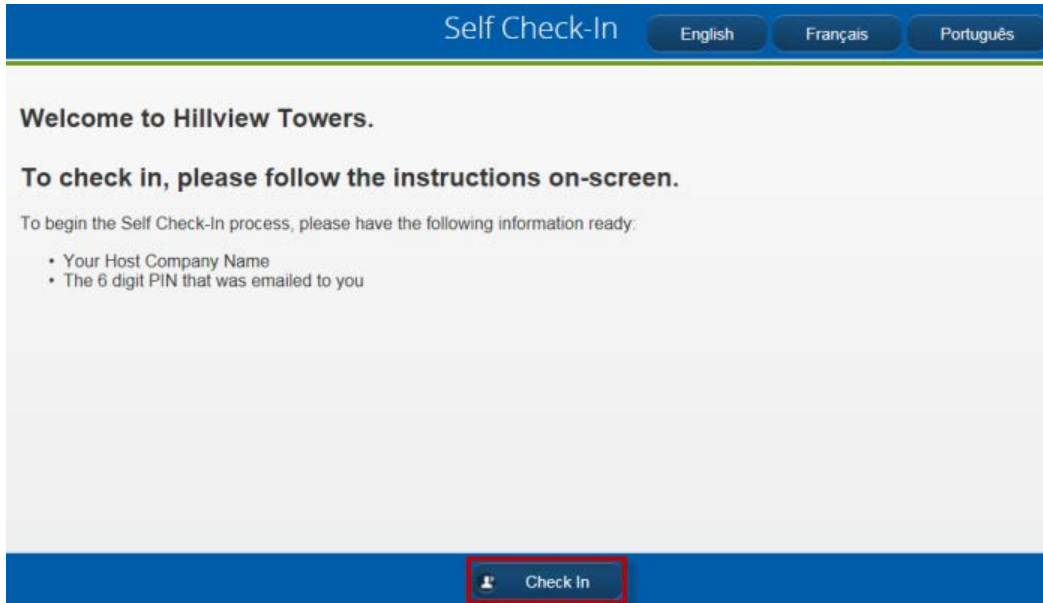
To use the kiosk, visitors will need to know the name of the company they are visiting, and their PIN. For an overview of the check-in process, see [Using Self Check-In](#).



- Changing the email address for a visitor that has already received an email notification will cause the notification to be re-sent with a new PIN. The previously issued PIN will no longer work.
- Removing the email address will invalidate the PIN that was emailed to the visitor (the PIN will no longer work).

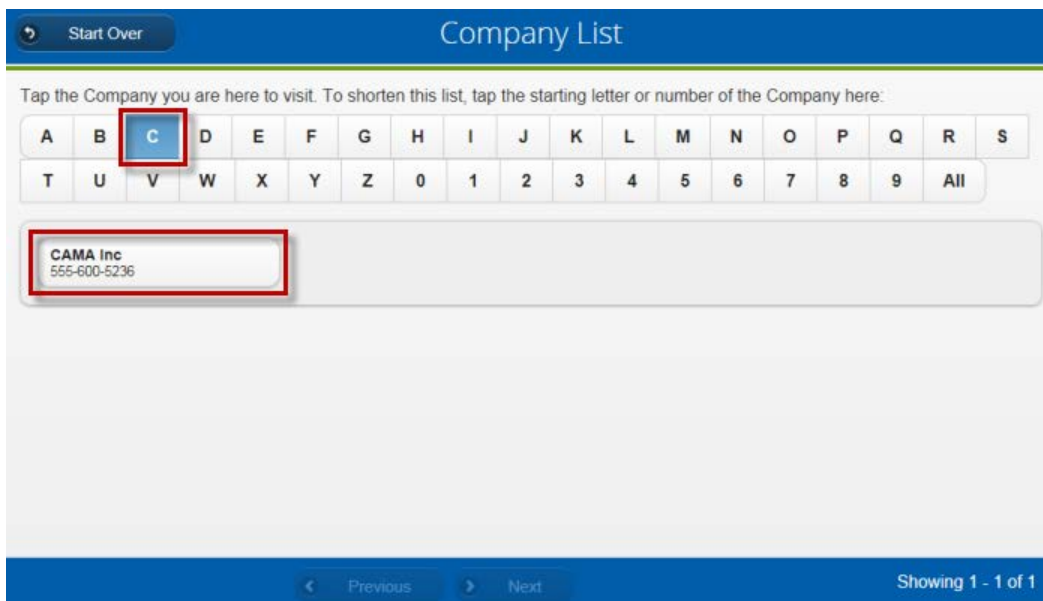
Using Self Check-In

At the main screen, pressing **Check In** starts the process.



Visitors are able to check in using the kiosk in 3 easy steps:

1. Locate the company being visited.
 - The visitor can filter the list by letter (for example, displaying all companies that start with "C"). Once found, the visitor selects the company.
 - The **Previous** and **Next** buttons at the bottom of the screen can be used to page through longer company lists.



2. The visitor then enters the 6-digit PIN that was provided in the email and selects **Continue**.

Start Over Enter PIN

Company: CAMA Inc

PIN: 528938

1	2	3
4	5	6
7	8	9
0	<Backspace	

Continue

3. The visitor's name, the name of the host, and the company name are displayed on a confirmation screen. The visitor selects **Check In** to complete the process and print out a badge.

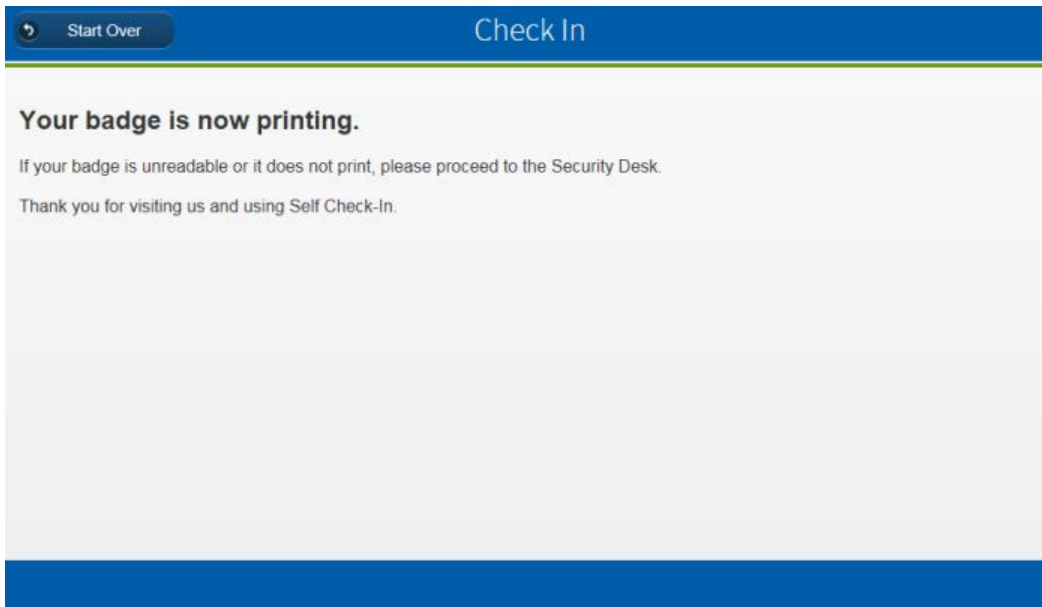
Start Over Confirm Details

Name: Karen Guilmore

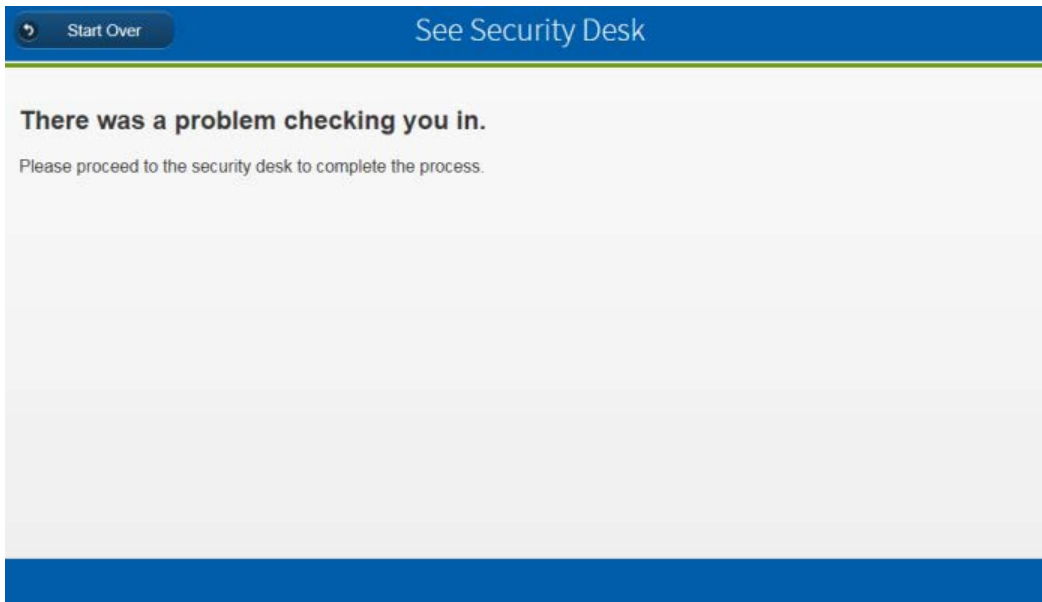
Host: John Smith at CAMA Inc

Check In

- If the process completed successfully, then the following screen is displayed:



- Visitors that experience difficulties checking in, such as being unable to enter their PIN correctly, will be directed to the security desk to check in.



Package Pass

About Package Pass

In properties where removal of goods is a concern, Package Pass allows tenants to identify individuals who will be removing specific items from the building, and provide authorisation to building security allowing the item to be removed.

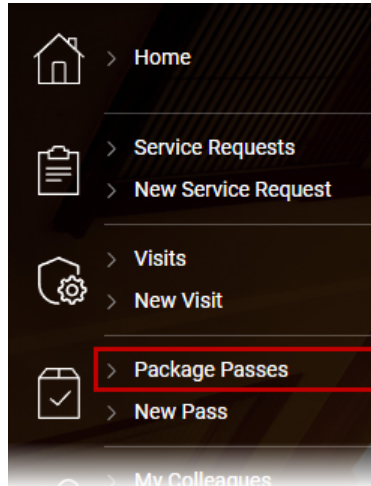
Package Pass provides the following features:

- Names a specific person who will be removing items from an office.
- A physical description of the items being removed can be provided.
- Package Pass requests require approval from a Tenant Authorizer.
- Once approved, a pass can be printed.

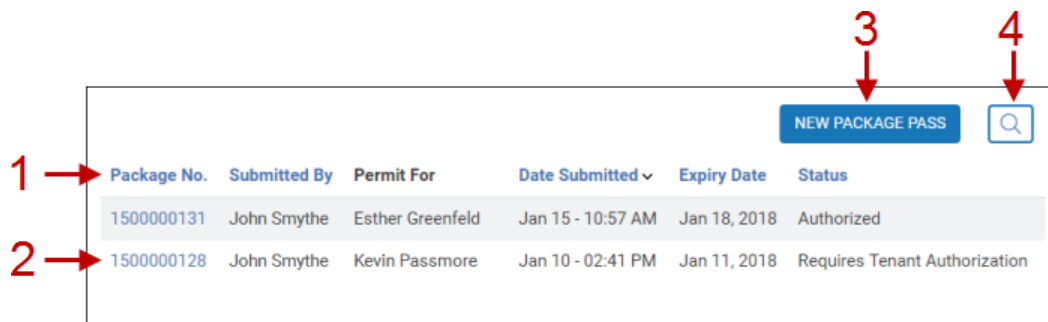
See the additional topics in this section for additional information on using Package Pass.

The Package Pass List


The Package Pass List is a searchable list of all package pass requests, whether they are still awaiting approval, have been approved or declined. To open the Package Pass list, click on **Package Passes** in the navigation menu (☰ MENU).

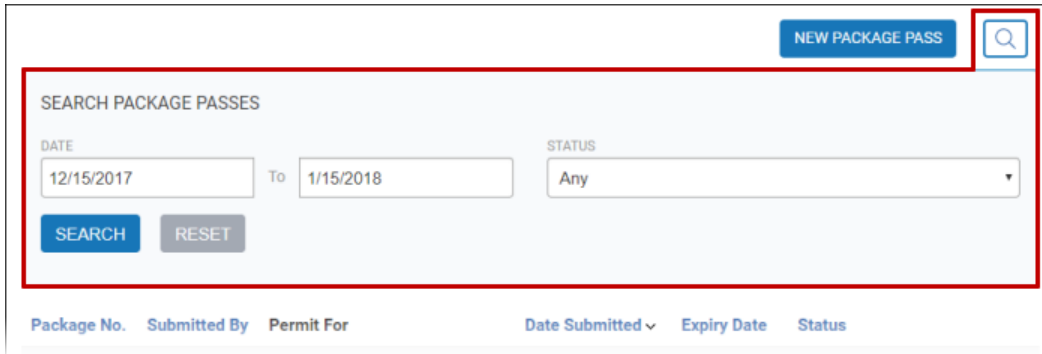


An overview of the Package Pass list and its functionality is detailed below.



1. You can sort the list by clicking on the following column headings:
 - Package Number
 - Submitted By
 - Date Submitted (default)
 - Expiry Date
 - Status (Requires Tenant Authorization, Authorized, or Declined)
2. To view the details of a package pass, or to print an approved pass, click the associated **Package Number** in the left-hand column. For more information on printing Package Passes, see [Printing a Pass](#).
3. Click **New Package Pass** to request a new pass. See [Requesting a Package Pass](#) for additional details.

4. Click the **Search** button () to view additional filtering options, as detailed below.



NEW PACKAGE PASS

SEARCH PACKAGE PASSES

DATE

12/15/2017 To 1/15/2018

STATUS

Any

SEARCH RESET

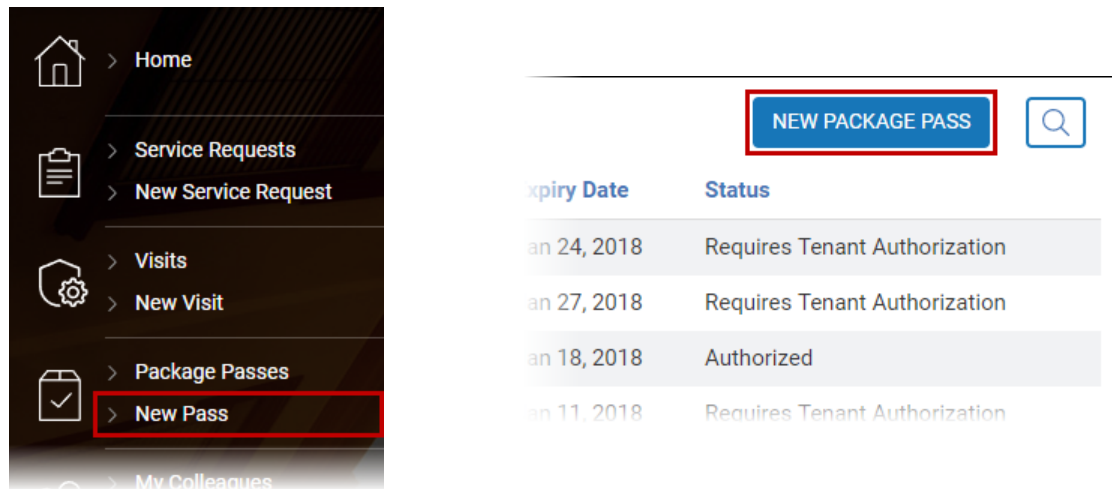
Package No. Submitted By Permit For Date Submitted Expiry Date Status

Requesting a Package Pass


If your Property Management office requires use of the package pass system to remove office items, you must first request a package pass. This pass must be approved by a Tenant Authorizer.

To request a package pass:

1. Click on **New Pass** in the navigation menu (☰ MENU), or from the [Package Pass list](#), click the **New Package Pass** button.



2. Enter the following information in the provided form fields:
 - If your company has offices in multiple buildings, you may be asked to select the building from a dropdown list (as shown below).
 - The **Floor** and **Suite** that the items will be removed from.
 - In the **Permit For** field, use the dropdown list or enter the full name in the field provided to specify who will be removing items.
 - Enter an **Expiration Date** for the pass; this date cannot be more than two weeks past the current date.
 - Use the **Details** field to describe the items that will be removed. Include any identifying information on the items such as serial numbers or asset tag numbers, as applicable.

 NEW PACKAGE PASS

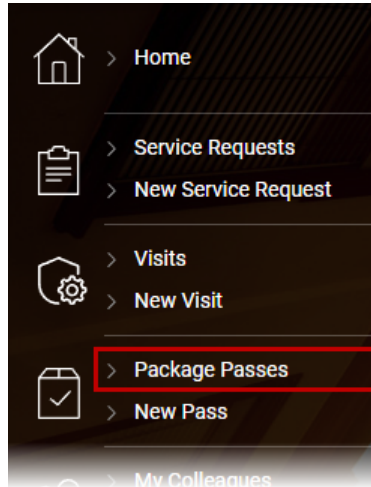
BUILDING	Hillview Towers
FLOOR	2
SUITE	201
PERMIT FOR	John Smythe
	OR
	<input type="text"/>
EXPIRATION DATE	01/16/2018
DETAILS	Removing 3 servers with the following asset tag numbers: 29834, 29835, 29836

3. Press **Submit**. A summary of your Package Pass request is displayed. Please note that a Tenant Authorizer must approve the request. Once your request has been authorized, you can [print the request](#) as a badge, to be carried by the individual that will be removing items.

Printing a Pass

Once your Package Pass has been approved, you will be able to print a badge. This should be kept on the person who will be removing the items from your office.


1. Locate your approved package pass by clicking **Package Passes** in the Package Pass section of the navigation menu. For more detailed information about searching through the pass list, see [The Package Pass List](#) topic.



2. Click the **Package Number** on the pass that you want to print. The pass details are displayed.

Package No.	Submitted By	Permit For	Date Submitted	Expiry Date	Status
1500000131	John Smythe	Esther Greenfeld	Jan 15 - 10:57 AM	Jan 18, 2018	Authorized
1500000128	John Smythe	Kevin Passmore	Jan 10 - 02:41 PM	Jan 11, 2018	Requires Tenant Authorization

3. Click **Print**.

 PACKAGE PASS DETAILS

PACKAGE NO. 1500000131	STATUS Authorized - Jan 15 - 11:01 AM	PROPERTY ACI - LENEL (TenantIntegration)
BUILDING Hillview Towers	FLOOR 2	SUITE 202
TENANT ACME Business Solutions	SUBMITTED BY John Smythe	PERMIT FOR Esther Greenfeld
DATE SUBMITTED Jan 15 - 10:57 AM	EXPIRY DATE Jan 18, 2018	DETAILS Moving three (3) Samsung 4k computer monitors, packed in their original boxes.

AUTHORIZATION NOTES

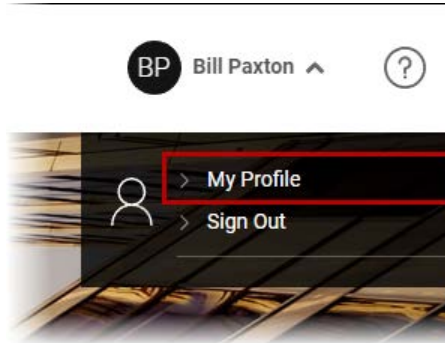
[RETURN](#) [PRINT](#)

4. A pop-up window will open, containing a formatted badge that can be printed. Use your web browser's built-in print function by pressing the **Ctrl-P** on your keyboard.

My Profile

Changing Your Profile

The My Profile screen allows you to manage the information in your account. You can access your profile by clicking on your name in the top-right corner of the screen, then selecting **My Profile**.



For Tenant Administrators, depending on the method used by your Property Managers to handle access cards, the information detailed below may be displayed under a **Profile** tab, and you will see an additional **Access Card** tab. For additional information concerning this tab, see [The Access Card Tab](#).

A breakdown of each section of the My Profile screen and the various options available are provided below.

A screenshot of the 'My Profile' form, divided into three sections indicated by red brackets on the left. Section 1, 'GENERAL', includes fields for First Name (Bill), Last Name (Paxton), Property (Mackillop Property), Building (Mackillop Building A), Floor & Suite (02), Phone (414-555-1212), Fax, and E-Mail (bpaxton@email.com). Section 2, 'EMERGENCY INFORMATION', includes fields for Phone 1 (414-555-2094), Phone 2, E-Mail (bpaxton@email.com), and SMS (414-555-2094). Section 3, 'LOG IN, PERMISSIONS & SUBSCRIPTIONS', includes a password rule, Username (bpaxton), New Password, and Confirm Password fields. At the bottom, there are links for 'E-Mail Subscriptions' and 'Permissions'.

apasson

E-Mail Subscriptions
Please check the following boxes to indicate which email notifications you wish to receive

Requests

- Request Confirmation
- Request Cancelled
- Request in Progress
- Request Delayed
- Request Completed
- Estimate Approval Required
- Billing Reports

Reservations

- Reservation Confirmation
- Reservation Confirmation - Approval Required
- Reservation Approved
- Reservation Rejected
- Reservation Cancelled

Announcements

- Employee Announcement
- Fire Drill
- General Announcement

Emergencies

- Emergency Action/Fire Safety
- EMERGENCY NOTIFICATION
- Severe Weather

Permissions

- Can Submit Requests
- Can Submit Reservations
- Can Invite Visitors
- Can View All Requests
- Can View All Reservations
- Can View All Visits
- Subscribes to Announcements
- Subscribes to Emergencies
- Can Manage Colleagues
- Can Access All Properties in Tenant Group
- Can Access Billing Reports

Meeting Room Panel

- Email QR and Reservation Code
Last Sent: November 29, 2018 - 12:33 PM

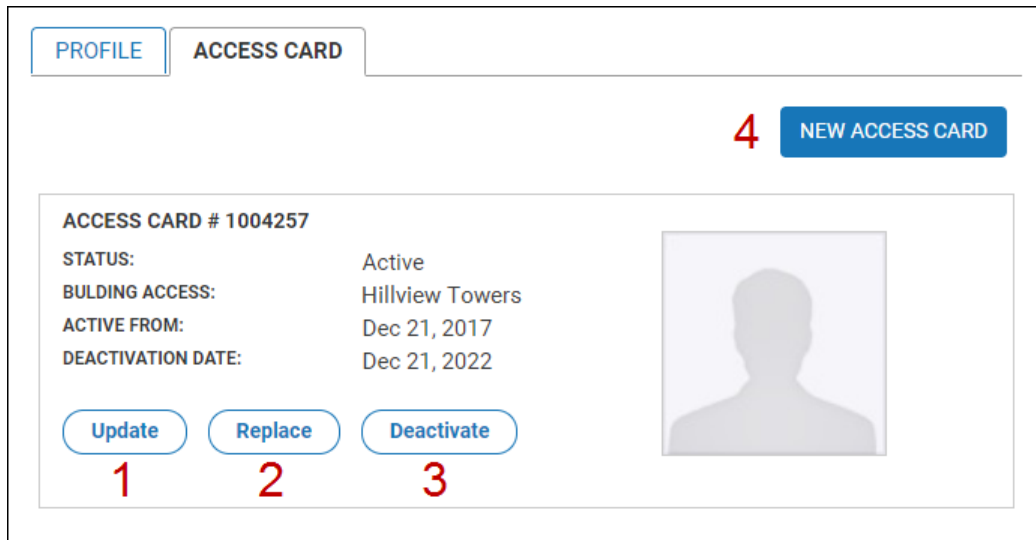
SAVE

1. The **General** section contains contact and location information. The following information can be changed in this section:
 - First Name and Last Name
 - Building (if more than one is available on your property)
 - Floor & Suite
 - Phone
 - Fax
 - Email
 - CC (used with service requests and reservation notifications)
2. The **Emergency Information** section allows you to enter emergency contact information, which will be used to receive building-related emergency notifications from Property Management. The following information can be provided:

- Phone 1, Phone 2
 - Email
 - SMS
3. The first subsection of the **Login, Permissions & Subscriptions** section allows you to modify the username and password you use to log in to the Service Portal. Any rules regarding passwords, such as minimum length, are also listed here.
 - If you are changing your password, you must enter your new password twice (in the **New Password** and **Confirm Password** fields) to help ensure your new password has been entered as intended.
 4. The **E-Mail Subscriptions** subsection displays the notification types that you are subscribed to. If you have sufficient access, you can change the notifications you will receive by adding or removing checkmarks beside each notification type.
 5. The **Permissions** subsection displays your current general level of access. This section is for informational purposes only and cannot be edited. Requests for changes in your permissions settings can be directed to your company's Tenant Administrators (if you have Tenant Administration set up), or your Property Manager.
 6. If your building uses Meeting Room Panels, then this section will appear if you have previously been sent a QR Code and PIN for use with the panels. Checking **Email QR and Reservation Code** will re-send the code to the email address listed in your profile.
 7. When you are finished making changes, click **Save**.

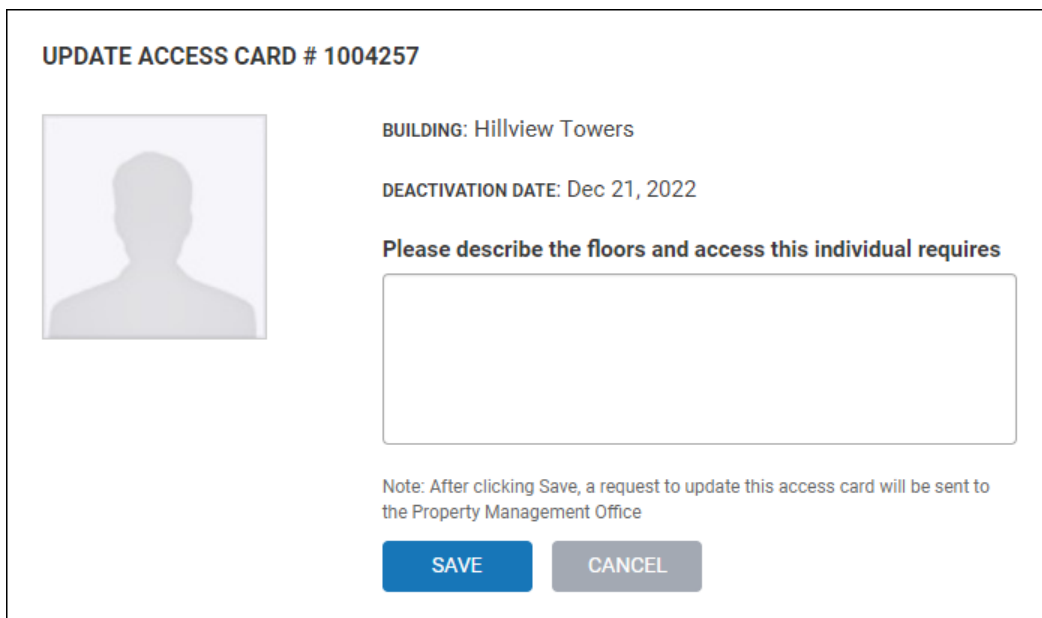
The Access Card Tab

Depending on the method used by your Property Managers to handle access cards, Tenant Administrators may see an additional **Access Card** tab when viewing their own profile, when viewing a colleague's profile, or when creating a new colleague profile. Under this **Access Card** tab, you can view information related to the profile's building access card, and make service requests related to access cards. See below for additional details.



The screenshot shows a user profile interface with two tabs: 'PROFILE' and 'ACCESS CARD'. The 'ACCESS CARD' tab is active. In the top right corner, there is a red number '4' and a blue button labeled 'NEW ACCESS CARD'. Below this, there is a card for 'ACCESS CARD # 1004257'. The card displays the following information: STATUS: Active, BUILDING ACCESS: Hillview Towers, ACTIVE FROM: Dec 21, 2017, and DEACTIVATION DATE: Dec 21, 2022. To the right of this information is a placeholder for a user's profile picture. At the bottom of the card, there are three buttons: 'Update' (labeled with a red '1'), 'Replace' (labeled with a red '2'), and 'Deactivate' (labeled with a red '3').


1. Click **Update** to request an update to the access card's security level.
 - In the field provided, indicate the access level that the card should have (e.g. Parking, Floor 10) and the time of day that your card should have this access.
 - Click **Save** to send your request to Property Management. A trackable Service Request is also created, allowing you to stay informed on the progress of your request.



The screenshot shows the 'UPDATE ACCESS CARD # 1004257' form. On the left side, there is a placeholder for a user's profile picture. To the right, the form displays the following information: BUILDING: Hillview Towers, DEACTIVATION DATE: Dec 21, 2022. Below this, there is a section titled 'Please describe the floors and access this individual requires' with a large text input field. At the bottom of the form, there is a note: 'Note: After clicking Save, a request to update this access card will be sent to the Property Management Office'. At the very bottom, there are two buttons: 'SAVE' (blue) and 'CANCEL' (grey).

2. Click **Replace** to request a replacement access card. Upon submission of this request, the existing access card will be immediately deactivated.
 - If your company has a supply of access cards to use as replacements, select **Assign Card Number** and enter the number on the access card. Otherwise, select **New card required**.
 - In the field provided, indicate the access level that the card should have (e.g. Parking, Floor 10) and the time of day that your card should have this access.
 - If your access cards include photo ID, click **Upload Photo** to include a photograph. Please note the photograph guidelines listed on-screen to ensure that your picture will be acceptable.
 - Click **Save** to send your request to Property Management. A trackable Service Request is also created, allowing you to stay informed on the progress of your request.

REPLACE ACCESS CARD # 1004257



Upload Photo

BUILDING: Hillview Towers

DEACTIVATION DATE: Dec 21, 2022

Access Card

New card required

Assign Card Number

1004299

Please describe the floors and access this individual requires

Parking, Floor 10, 8am-6pm

Note: After clicking Save, the existing card will be DEACTIVATED IMMEDIATELY and a request for a new access card will be created

SAVECANCEL


Please ensure:

- The photo is focused with the correct orientation
- The person is front-facing, has open eyes, and is not wearing a hat
- The photo type is a JPG, GIF, PNG, or BMP file
- The photo is less than 5MB

3. Click **Deactivate** to request deactivation of a card. Please note that this option does not include a request for a replacement card.
 - You can either select **Deactivate Immediately**, or a future date for the card to be deactivated.
 - Enter a **Reason** for the deactivation in the dropdown provided.
 - If you select **Terminated** as the reason for deactivation, then you will need to provide additional information concerning the termination in an additional field. This information will be passed along to the security desk.


- Click **Save**. The will be automatically deactivated on the specified date.
 - If there are no other active cards associated with the account, then a popup will ask if you would also like to deactivate the account. Click **Yes** if you would like to deactivate it. You can also manually deactivate accounts, as described in [Deactivating a Colleague](#).

DEACTIVATE ACCESS CARD # 1004257



Deactivation Date

Deactivate card immediately



Reason

Note: After clicking Save, the new deactivation date will take effect

4. Click **New Access Card** to request a new access card. If the profile you are viewing currently has no access card, then this will be the only option available to you.
 - If your company has a supply of access cards to use as replacements, select **Assign Card Number** and enter the number on the access card. Otherwise, select **New card required**.
 - Select the **Building** that the card should have access to.
 - Indicate if this is a **Permanent** or **Temporary** card.
 - Enter an activation date using the **Active From** field (default is today). If this is a temporary card, you will also need to enter a **Deactivation Date**.
 - In the field provided, indicate the access level that the card should have (e.g. Parking, Floor 10) and the time of day that the card should have this access.
 - If your access cards include photo ID, click **Upload Photo** to include a photograph. Please note the photograph guidelines listed on-screen to ensure that your picture will be acceptable.
 - Click **Save** to send your request to Property Management. A trackable Service Request is also created, allowing you to stay informed on the progress of your request.

Card Number

- New card required
- Assign Card Number

100745

Building:

Hillview Towers ▼

Access Card

- Permanent
- Temporary

Active From:

1/16/2018 

Please describe the floors and access this individual requires

Parking, Floor 10, 8am-6pm

Note: After clicking Save, a request for a new access card will be sent to the Property Management Office

SAVE

CANCEL



Upload Photo


Please ensure:

- The photo is focused with the correct orientation
- The person is front-facing, has open eyes, and is not wearing a hat
- The photo type is a JPG, GIF, PNG, or BMP file
- The photo is less than 5MB

Authorization

Setup

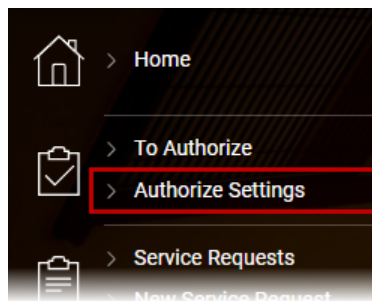
The Tenant Authorization feature is used to designate specific colleagues as Tenant Authorizers. When new service requests are created, Tenant Authorizers have the ability to authorize or decline these requests in the Service Portal.



- It is **not** necessary for Tenant Authorizers to be [Tenant Administrators](#).
- Tenant Authorizers that would like to receive email notifications need to enable this feature in their user preferences. See [Changing Your Profile](#) for more information.

The Setup screen allows you to set up automatic authorization for certain request types. To access and configure the Authorization Setup screen follow the steps below:

1. From the Navigation Menu (☰ MENU), click **Authorize Settings**. This will display the Authorization screen.



2. To select which Request Types can be automatically authorized, locate the desired **Request Type** and click the checkbox to select it. As shown in the screenshot below, these settings will apply to all authorizers in your company.

[RETURN](#)

The following settings apply to you and all other authorizers within **ACME Co.**

Automatically authorize service requests of the type(s) below. All other service requests must be authorized manually.

<input checked="" type="checkbox"/> Access Card	<input type="checkbox"/> Access Card - Deactivate
<input type="checkbox"/> Access Card - New Employee	<input type="checkbox"/> Access Card - Replacement
<input type="checkbox"/> Carpet	<input checked="" type="checkbox"/> Housekeeping
<input type="checkbox"/> Furniture - Add/Change/Delete	<input type="checkbox"/> HVAC - General
<input checked="" type="checkbox"/> HVAC - After Hours	

[SUBMIT](#)

3. Click **Submit** to save your changes.

Authorizing Items

The Tenant Authorization feature is used to designate specific colleagues as Tenant Authorizers. When new service requests are created, or when [package passes](#) are requested (if this feature is used by your Property Management company), Tenant Authorizers have the ability to authorize or decline these requests in the Service Portal.



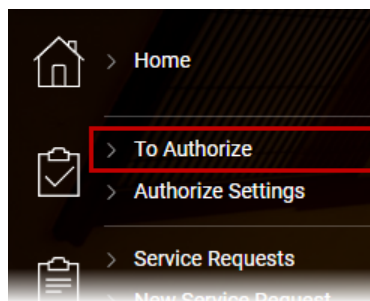
You can enable automatic authorization of specific request types. See the [Setup](#) topic for additional details.

Refer to the [Authorizing Service Requests](#) and [Authorizing Package Passes](#) subsections below for additional details.

Authorizing Service Requests

To view and provide responses to Service Requests that require authorization, follow the steps below:

1. From the Navigation Menu (☰ MENU), click **To Authorize**. This will display the Authorization screen.



2. The Authorization list is displayed. You can sort the Authorization list by clicking on the following column headings: Request Number, Date Received, and Colleague.

SERVICE REQUESTS TO AUTHORIZE				
Request No.	Date Received	Colleague	Request Type	Details
11929051	Apr 18 - 10:22 AM	Karen Guilmore	Key & Lock	Lock on office door is very stiff, needs to be jiggled to turn.
11929049	Apr 18 - 10:21 AM	Karen Guilmore	HVAC - Too Cold	Too cold in my office.
11929048	Apr 18 - 10:21 AM	Karen Guilmore	Carpet	Spill in reception area

3. To authorize a Service Request, or request a cost-estimate from Property Management, locate the desired Service Request and click the **Request Number**, or double-click on the row.

SERVICE REQUESTS TO AUTHORIZE				
Request No.	Date Received	Colleague	Request Type	Details
11929051	Apr 18 - 10:22 AM	Karen Guilmore	Key & Lock	Lock on office door is very stiff, needs to be jiggled to turn.
11929049	Apr 18 - 10:21 AM	Karen Guilmore	HVAC - Too Cold	Too cold in my office.
11929048	Apr 18 - 10:21 AM	Karen Guilmore	Carpet	Spill in reception area

4. In the Service Request Details screen, a section at the top is displayed that provides the following options:
 - **Authorize This Request** (default)
 - Decline This Request
 - **Request Estimate** (from Property Management)
 - This option is not displayed if the Estimates feature is not enabled by Property Management. For more information on requesting and approving estimates, see [About Estimates](#) and associated topics
 - You can also optionally send a note to the original requester explaining your decision in the **Explanation/Message To Requester** field.
 - If you do not want to make a decision at this time, you can click **Return**.
5. After making your decision, click **Save My Decision**. When the requester logs in to the Service Portal, Requests that are authorized will be marked **Authorized** and those that are declined will be marked **Declined**. If you requested an estimate, then Property Management will be notified; see [About Estimates](#) and associated topics for additional details.

The screenshot shows the 'Service Request Details' screen. At the top right is a 'RETURN' button. The main content area is divided into two sections: 'Please review the request and authorize' and 'Explanation / Message To Requester (optional)'. The first section contains three radio button options: 'Authorize This Request' (selected), 'Decline This Request', and 'Request Estimate'. Below these options is a 'SAVE MY DECISION' button. The second section is a large text input field. Below the main content area is a 'DETAILS' section with a table:

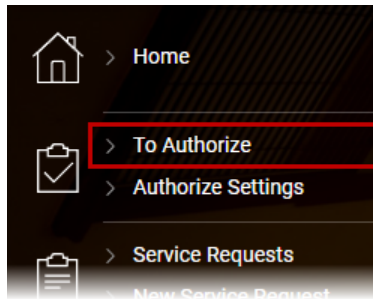
STATUS	DATE SUBMITTED	REQUEST TYPE
Open	April 18 2017, 10:22 AM	Key & Lock

Below the table, the text 'REQUESTED BY' is visible.

Authorizing Package Passes

To view and provide responses to Service Requests that require authorization, follow the steps below:

1. From the Navigation Menu (MENU), click **To Authorize**. This will display the Authorization screen.



- The Authorization list is displayed. Package passes are displayed in a separate list below Service Requests. You can sort the Package Pass list by clicking on the following column headings: Package Number, Submitted By, Date Submitted, and Expiry Date.

PACKAGE PASSES TO AUTHORIZE				
Package No.	Submitted By	Permit For	Date Submitted	Expiry Date
1500000143	Caroll Bishop	Caroll Bishop	Jan 17 - 11:06 AM	Jan 31, 2018
1500000142	Gloria Diaz	Gloria Diaz	Jan 17 - 10:56 AM	Jan 19, 2018

- To authorize a Package Pass, locate the pass you want to authorize and click the **Request Number**, or double-click on the row.

PACKAGE PASSES TO AUTHORIZE				
Package No.	Submitted By	Permit For	Date Submitted	Expiry Date
1500000143	Caroll Bishop	Caroll Bishop	Jan 17 - 11:06 AM	Jan 31, 2018
1500000142	Gloria Diaz	Gloria Diaz	Jan 17 - 10:56 AM	Jan 19, 2018

- In the Package Pass details screen, a section at the bottom is displayed that provides the following options:
 - Authorize This Request (default)
 - Decline This Request
 - You can also optionally send a note to the original requester clarifying your decision in the **Explanation** field.
 - If you do not want to make a decision at this time, you can click **Return**.

5. After making your decision, click **Save My Decision**. When the requester logs in to the Service Portal, Package Passes that are authorized will be marked **Authorized** and those that are declined will be marked **Declined**.

EXPIRY DATE Jan 31, 2018	DETAILS Moving three 4k Samsung computer monitors in their original packaging.
------------------------------------	--

AUTHORIZATION

My Decision <input checked="" type="radio"/> Authorize This Package Pass <input type="radio"/> Decline This Package Pass	Explanation <div style="border: 1px solid #ccc; height: 70px; width: 100%;"></div>
---	--

Estimates

About Estimates

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; rejected estimates will cancel the Service Request.

The estimate request and approval process varies depending on whether you have [Tenant Authorization](#) enabled or not:

- Estimates [with tenant authorization](#)
- Estimates [without tenant authorization](#)

With Tenant Authorization

When Tenant Authorization is enabled, only Tenant Authorizers can request, approve or reject estimates. Requests for estimates must occur before approving the item.

Requesting an Estimate

1. When [authorizing items](#), any billable service request will provide Tenant Authorizers with the option to request an estimate. Select **Request Estimate**.
2. Click **Save My Decision**.

DETAILS		
STATUS	DATE SUBMITTED	REQUEST TYPE
Open	April 18 2017, 10:22 AM	Key & Lock
REQUESTED BY		

3. When Property Management responds with a cost-estimate, the service request will reappear in your list. See [Approving an Estimate](#) and [Rejecting an Estimate](#) below for additional details.



If you are a Tenant Authorizer and are entering a service request, you can instead request an estimate at the time that you create it by putting a checkmark beside the **Estimate Required** option. This option only appears to Tenant Authorizers.

Approving an Estimate

1. Estimates from Property Management can be viewed in the [Items to Authorize](#) screen.
2. To approve the estimate, you must view the estimate's details by clicking the **Request Number**, or double-clicking on the row.

SERVICE REQUESTS TO AUTHORIZE				
Request No.	Date Received	Colleague	Request Type	Details
11929051	Apr 18 - 10:22 AM	Karen Guilmore	Key & Lock	Lock on office door is very stiff, needs to be jiggled to turn.
11929049	Apr 18 - 10:21 AM	Karen Guilmore	HVAC - Too Cold	Too cold in my office.
11929048	Apr 18 - 10:21 AM	Karen Guilmore	Carpet	Spill in reception area

- On the Service Request Details screen, review the estimate cost and any additional relevant information from Property Management.
- In the **Estimate** section at the top of the details screen:
 - Select **Approve Estimate**.
 - Enter any notes related to the decision in the space provided.
 - Click **Save My Decision**.
 - If you do not want to make a decision at this time, you can click **Return to List** at the top-right corner of the screen.

[RETURN](#)

E ESTIMATE IS PENDING APPROVAL

Service Provided	Quantity	Total
New Lock	1	\$198.00
Total:		\$198.00

Please review the estimate and authorize

Approve Estimate
 Reject Estimate

Additional notes regarding your decision:

SAVE MY DECISION

DETAILS

STATUS	DATE SUBMITTED	REQUEST TYPE
Open	April 18 2017 10:22 AM	Key & Lock

Rejecting an Estimate

- Estimates from Property Management can be viewed in the [Items to Authorize](#) screen.
- To reject the estimate, you must view the estimate's details by clicking the **Request Number**, or double-clicking on the row.

SERVICE REQUESTS TO AUTHORIZE				
Request No.	Date Received	Colleague	Request Type	Details
11929051	Apr 18 - 10:22 AM	Karen Guilmore	Key & Lock	Lock on office door is very stiff, needs to be jiggled to turn.
11929049	Apr 18 - 10:21 AM	Karen Guilmore	HVAC - Too Cold	Too cold in my office.
11929048	Apr 18 - 10:21 AM	Karen Guilmore	Carpet	Spill in reception area

3. On the Service Request Details screen, review the estimate cost and any additional relevant information from Property Management.
4. In the **Estimate** section at the top of the details screen:
 - Select **Reject Estimate**.
 - Enter any notes related to the decision in the space provided.
 - Click **Save My Decision**.
 - If you do not want to make a decision at this time, you can click **Return to List** at the top-right corner of the screen.

ESTIMATE IS PENDING APPROVAL

Please review the estimate and authorize

Service Provided	Quantity	Total
New Lock	1	\$198.00
	Total:	\$198.00

Approve Estimate
 Reject Estimate

Additional notes regarding your decision:

SAVE MY DECISION

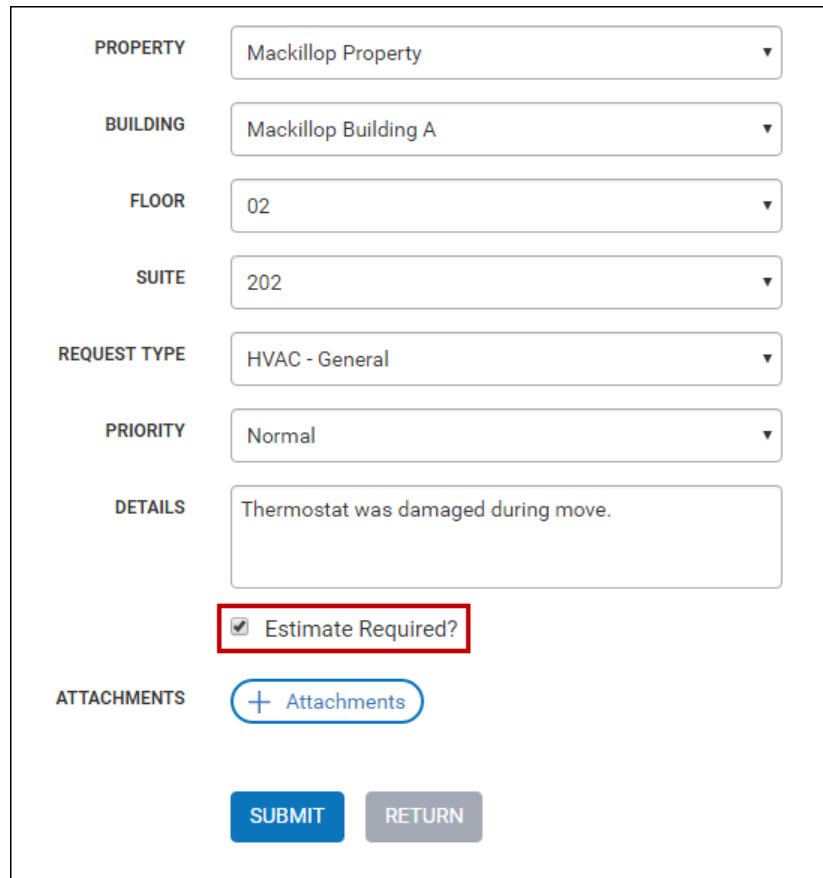
RETURN

DETAILS

STATUS	DATE SUBMITTED	REQUEST TYPE
Open	April 18, 2017, 10:22 AM	Key & Lock


Without Tenant Authorization

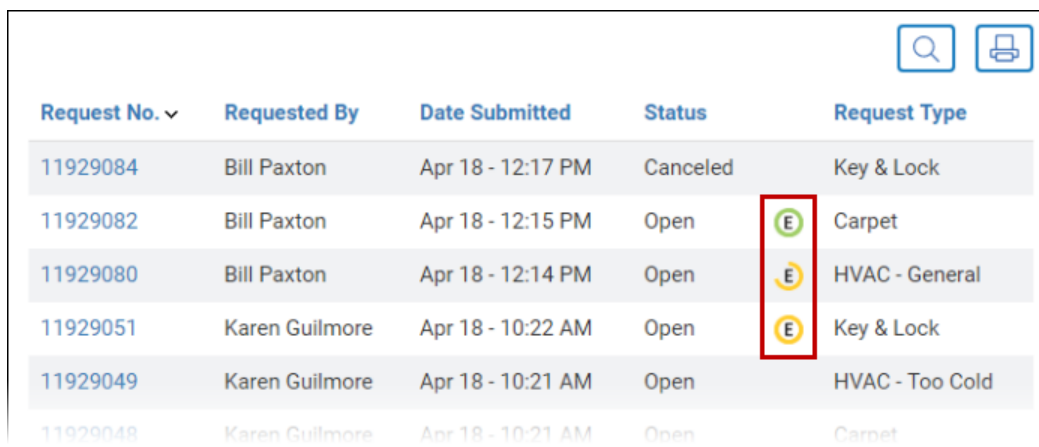
For tenants that are not using the Tenant Authorization feature, when you are entering a service request you can request an estimate by placing a checkmark beside **Estimate Required**. For more information on filling out a service request, see [Making a Service Request](#).









The screenshot shows a service request form with the following fields:

- PROPERTY: Mackillop Property
- BUILDING: Mackillop Building A
- FLOOR: 02
- SUITE: 202
- REQUEST TYPE: HVAC - General
- PRIORITY: Normal
- DETAILS: Thermostat was damaged during move.
- Estimate Required? (highlighted with a red box)
- ATTACHMENTS: + Attachments
- SUBMIT (blue button)
- RETURN (grey button)

After submitting the service request, you can view the status of your request by clicking on **Service Requests** from the Navigation Menu ( MENU) and finding the request. Service requests which require estimates are displayed with a color-coded estimate icon.




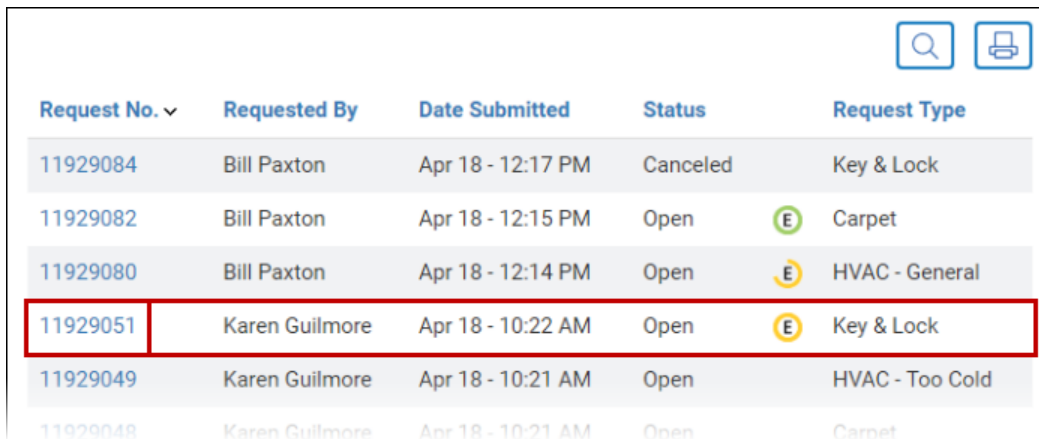
Request No. ▾	Requested By	Date Submitted	Status	Request Type
11929084	Bill Paxton	Apr 18 - 12:17 PM	Canceled	Key & Lock
11929082	Bill Paxton	Apr 18 - 12:15 PM	Open	 Carpet
11929080	Bill Paxton	Apr 18 - 12:14 PM	Open	 HVAC - General
11929051	Karen Guilmore	Apr 18 - 10:22 AM	Open	 Key & Lock
11929049	Karen Guilmore	Apr 18 - 10:21 AM	Open	HVAC - Too Cold
11929048	Karen Guilmore	Apr 18 - 10:21 AM	Open	Carpet




-  indicates that an estimate request has been sent and is **awaiting a response** from Property Management.
-  means that an estimate has been provided by Property Management and is **pending approval** (you can respond by approving or rejecting the estimate).
-  denotes that the estimate was **approved**.
- Rejected estimates are changed to have a status of **Canceled**, and no longer displays an estimate status icon.

See [Approving an Estimate](#) and [Rejecting an Estimate](#) below for additional details.

Approving an Estimate

1. Locate the request in the [Service Requests](#) list. If the request is marked with a yellow **pending approval** estimate icon () then you will be able to review and approve the estimate.
2. To approve the estimate, you must view the estimate's details by clicking on the **Request Number**, or by double-clicking on the row.



Request No. ▾	Requested By	Date Submitted	Status		Request Type
11929084	Bill Paxton	Apr 18 - 12:17 PM	Canceled		Key & Lock
11929082	Bill Paxton	Apr 18 - 12:15 PM	Open		Carpet
11929080	Bill Paxton	Apr 18 - 12:14 PM	Open		HVAC - General
11929051	Karen Guilmore	Apr 18 - 10:22 AM	Open		Key & Lock
11929049	Karen Guilmore	Apr 18 - 10:21 AM	Open		HVAC - Too Cold
11929048	Karen Guilmore	Apr 18 - 10:21 AM	Open		Carpet

3. On the estimate details screen that appears, review the estimate cost and any additional relevant information from Property Management.
4. In the **Estimate** section at the top of the details screen:
 - Select **Approve Estimate**.
 - Enter any notes related to the decision in the space provided.
 - Click **Save My Decision**.
 - If you do not want to make a decision at this time, you can click **Return to List** at the top-right corner of the screen.

[RETURN](#)

E

ESTIMATE IS PENDING APPROVAL

Service Provided	Quantity	Total
New Lock	1	\$198.00
	Total:	\$198.00

Please review the estimate and authorize

Approve Estimate
 Reject Estimate

Additional notes regarding your decision:

DETAILS

STATUS	DATE SUBMITTED	REQUEST TYPE
Open	April 18, 2017, 10:22 AM	Key & Lock

Rejecting an Estimate

1. Locate the request in the [Service Requests](#) list. If the request is marked with a yellow estimate icon (E) then you will be able to review and reject the estimate.
2. To reject the estimate, you must view the estimate's details by clicking the **Request Number**, or by double-clicking on the row.

Request No. ▾	Requested By	Date Submitted	Status		Request Type
11929084	Bill Paxton	Apr 18 - 12:17 PM	Canceled		Key & Lock
11929082	Bill Paxton	Apr 18 - 12:15 PM	Open	E	Carpet
11929080	Bill Paxton	Apr 18 - 12:14 PM	Open	E	HVAC - General
11929051	Karen Guilmore	Apr 18 - 10:22 AM	Open	E	Key & Lock
11929049	Karen Guilmore	Apr 18 - 10:21 AM	Open		HVAC - Too Cold
11929048	Karen Guilmore	Apr 18 - 10:21 AM	Open		Carpet

3. On the estimate details screen that appears, review the estimate cost and any additional relevant information from Property Management.
4. In the **Estimate** section at the top of the details screen:
 - Select **Reject Estimate**.
 - Enter any notes related to the decision in the space provided.
 - Click **Save My Decision**.

- If you do not want to make a decision at this time, you can click **Return to List** at the top-right corner of the screen.

ESTIMATE IS PENDING APPROVAL

Please review the estimate and authorize

Service Provided	Quantity	Total
New Lock	1	\$198.00
	Total:	\$198.00

Approve Estimate
 Reject Estimate

Additional notes regarding your decision:

SAVE MY DECISION

RETURN

DETAILS

STATUS	DATE SUBMITTED	REQUEST TYPE
Open	April 18, 2017, 10:22 AM	Key & Lock

Tenant Administrators

About Tenant Administrators

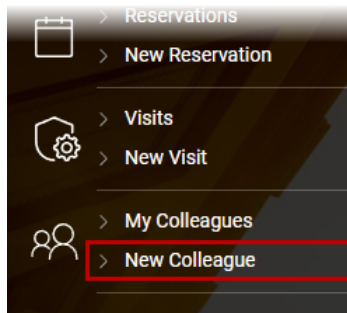
Tenant Administrators are users that have access to your Service Portal and have the ability to grant colleagues permission to do one or more of the following:

- Make tenant requests
- View billing reports
- Request reservations
- Create visits
- Self-subscribe to announcements

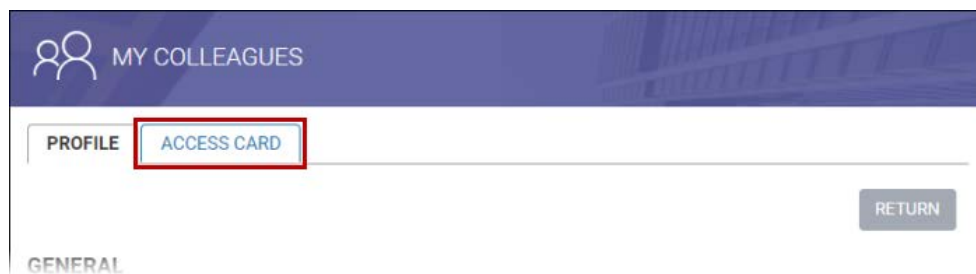
The abilities that a Tenant Administrator has are determined by their Tenant Administrator Permissions, which are set up at the time the account is created (or can be added later by Property Management).

Adding a Colleague

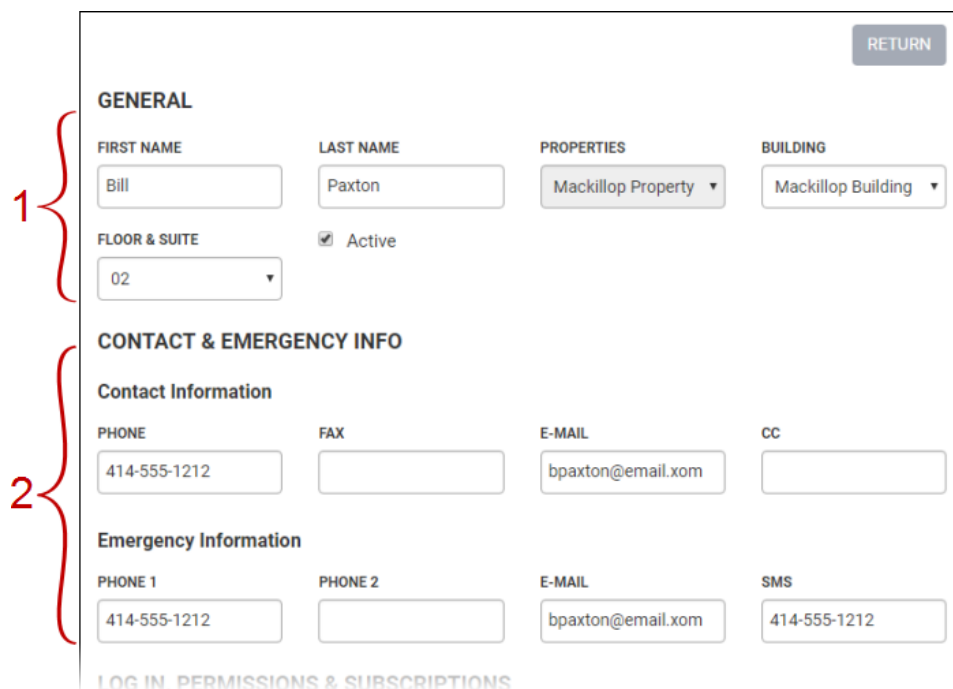
To add a colleague as a contact in the Service Portal, click **New Colleague** from the Navigation Menu (☰ MENU). The Contact Entry screen is displayed.



Depending on the method used by Property Management to handle access cards, the information below may be displayed under a **Profile** tab, and you will see an additional **Access Card** tab (as shown below), which is used to handle initial setup and additional requests related to the colleague's access card. For additional information, see [The Access Card Tab](#) topic.



A breakdown of each section of the New Colleague screen and the various options available are provided below.

A screenshot of the 'New Colleague' form. The form is titled 'GENERAL' and has a 'RETURN' button in the top right corner. The form is divided into several sections. Section 1, indicated by a red bracket on the left, includes fields for 'FIRST NAME' (Bill), 'LAST NAME' (Paxton), 'PROPERTIES' (Mackillop Property), 'BUILDING' (Mackillop Building), 'FLOOR & SUITE' (02), and an 'Active' checkbox. Section 2, also indicated by a red bracket on the left, includes 'CONTACT & EMERGENCY INFO'. This section is further divided into 'Contact Information' with fields for 'PHONE' (414-555-1212), 'FAX', 'E-MAIL' (bpaxton@email.xom), and 'CC'; and 'Emergency Information' with fields for 'PHONE 1' (414-555-1212), 'PHONE 2', 'E-MAIL' (bpaxton@email.xom), and 'SMS' (414-555-1212). At the bottom of the form, there is a section for 'LOG IN, PERMISSIONS & SUBSCRIPTIONS'.

414-555-1212 cpaxton@email.com 414-555-1212

LOG IN, PERMISSIONS & SUBSCRIPTIONS

Send email notification to colleague to create username and password

E-Mail Subscriptions
Please check the following boxes to indicate which email notifications you wish to receive

Requests

- Request Confirmation
- Request Cancelled
- Request in Progress
- Request Delayed
- Request Completed
- Estimate Approval Required
- Billing Reports

Reservations

- Reservation Confirmation
- Reservation Confirmation - Approval Required
- Reservation Approved
- Reservation Rejected
- Reservation Cancelled

Announcements

- Elevator Maintenance
- Employee Announcement
- Fire Drill
- General Announcement

Emergencies

- Emergency Action/Fire Safety
- EMERGENCY NOTIFICATION
- Severe Weather

Permissions

- Can Submit Requests
- Can View All Requests
- Can Submit Reservations
- Can View All Reservations
- Email QR and Reservation Code (Meeting Room Panel)
Last Sent: N/A
- Can Invite Visitors
- Can View All Visits
- Subscribe to Announcements
- Subscribe to Emergencies
- Access to Billing Reports
- Can Access All Properties in Tenant Group

1. The **General** section contains basic name and location details (First & Last name, Property & Building, Floor & Suite). Fill in all information in this section.
 - By default, the **Active** checkbox is selected. This indicates that the account will be immediately accessible. If you do not want the new account to be immediately accessible, you can remove this checkmark.
2. The **Contact & Emergency Info** section allows you to enter daytime and emergency contact information. Emergency contact information is used by Property Management to send emergency notifications.
3. Place a checkmark beside **Send email notification to colleague...** will send an email to your colleague with a link that will allow them to create a username and password. If no email address has been specified, then this option will be disabled, and login credentials will not be able to be made.

4. The **E-Mail Subscriptions** subsection displays the notification types that the colleague will be subscribed to. You can change the notifications the account will receive by adding or removing checkmarks beside each notification type.
5. The **Permissions** subsection is used to determine what level of access the account will have. Add or remove checkboxes to determine what the new user will have access to in the service portal, such as Service Requests, Visitor Security, and the ability to self-subscribe to announcements.



Depending on the specific administrative permissions you have been given, one or more options in the Permissions section may be inaccessible to you.

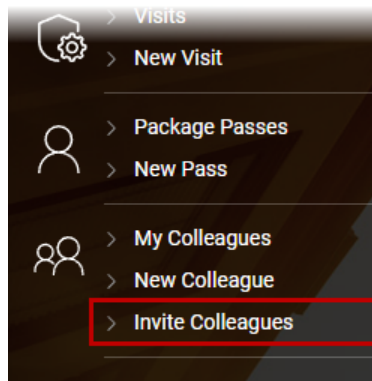
6. When you are finished making changes, click **Save**.

Inviting Colleagues

In addition to being able to manually [add a colleague](#), you can also simply invite one or more colleagues to join the service portal by email. When your colleagues follow the provided email link, they will then be prompted to enter any required profile information for their account.

To invite colleagues, follow the steps below:

1. Click **Invite Colleagues** from the navigation menu (☰ MENU).



2. On the Invite Colleagues screen, enter the email addresses of the colleagues that you want to invite to use the Service Portal, separated by commas (as shown below). Depending on your level of access and the features available in your service portal, there may additionally be one or more checkboxes that can be used to indicate the general level of access that your colleagues can have (can request services, can reserve resources, can invite visitors). By default, any available options are checked by default. Make any necessary modifications to these checkboxes and click **Save**. Please note that whatever options are selected will apply to all colleagues that you invite.

PROVIDE YOUR COLLEAGUE(S) ACCESS TO THE SERVICE PORTAL

Enter email addresses on a separate line, or using a comma or semi colon to separate each email on the same line.
Example: jsmith@ABCCompany.com, alex@acmecompany.com

PLEASE PROVIDE THE FOLLOWING PERMISSIONS TO MY COLLEAGUES :

Can Request Services Can Reserve Resources Can Invite Visitors

SAVE

3. Your colleagues will receive an email with a **Register** button, similar to the one shown below.



SERVICE PORTAL INVITE

This email has been sent to you so you can set up your Service Portal account profile. This password-protected system provides a convenient, web-based method for:

- Creating Tenant Service
- Entering expected visitors
- Reserving resources such as meeting rooms and moving elevators
- And more

REGISTER

Please note that the link shown above will automatically expire in 7 days.

If you have questions or believe this message has been sent to you in error, please contact your property management office.

3. After clicking **Register**, they will be presented with the web page shown below. Your colleagues should fill out all applicable information. At a minimum, they should fill out and/or verify the information in the following fields:
 - First and Last name
 - Verify the Building (if applicable) and select the correct building from the dropdown if the one displayed by default is incorrect.
 - Verify the floor and suite (if applicable) and select the correct floor/suite from the dropdown if the one displayed by default is incorrect.
 - Email (if a different email address is preferred)
 - Username (by default the email address is used, this can be changed if the colleague prefers a custom username)
 - Password and Password confirmation (these two fields must match)

Please take a moment to register with the system.

GENERAL INFORMATION

FIRST NAME	<input type="text" value="Caroll"/>
LAST NAME	<input type="text" value="Bishop"/>
BUILDING	<input type="text" value="Hillview Towers"/>
FLOOR & SUITE	<input type="text" value="1, 104"/>
PHONE	<input type="text" value="414-555-1212"/>
FAX	<input type="text"/>
E-MAIL	<input type="text" value="cbishop@email.xom"/>

USERNAME & PASSWORD

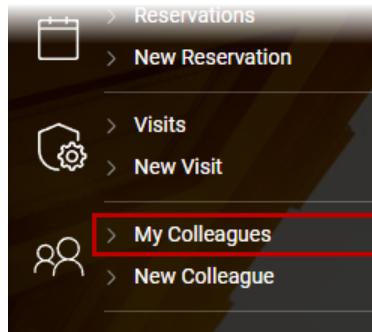
USERNAME	<input type="text" value="cbishop"/>
PASSWORD	<input type="password" value="....."/>
	<ul style="list-style-type: none">- Never shorter than 8 characters- Must contain at least 1 numeric characters [0-9]- Must contain at least 1 alpha characters [a-zA-Z]- Must not contain your username
CONFIRM PASSWORD	<input type="password" value="....."/>

- The colleague then clicks **Save** to complete the signup process. After clicking save, the colleague is automatically signed into the service portal, and can begin using it immediately.

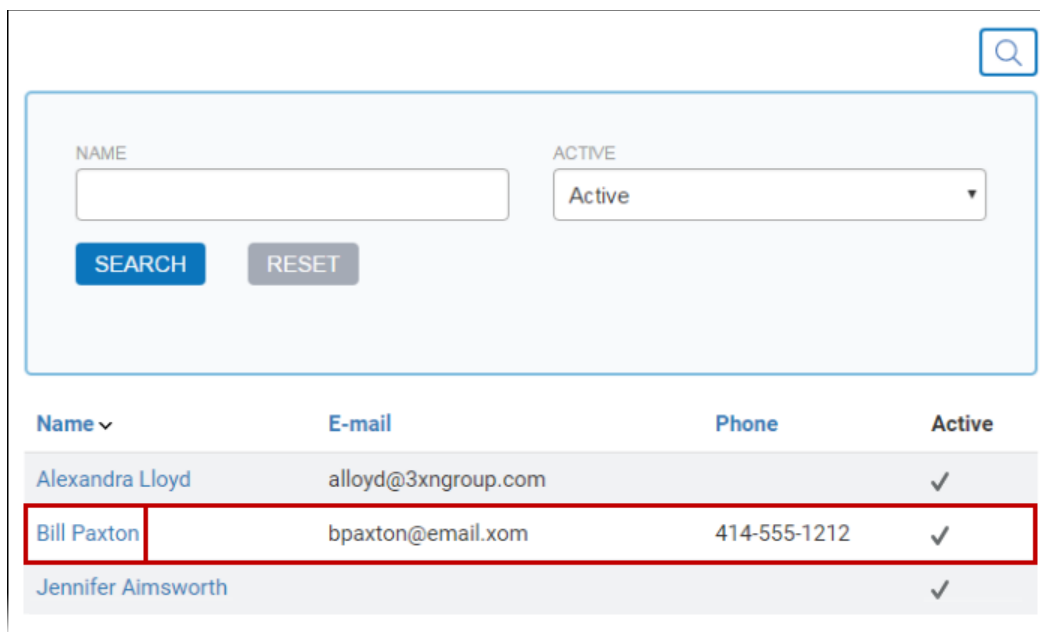
Modifying Colleagues

Tenant Administrators can modify their colleagues' settings in the following manner:

- Click **My Colleagues** from the Navigation Menu (☰ MENU) to display the My Colleagues list.

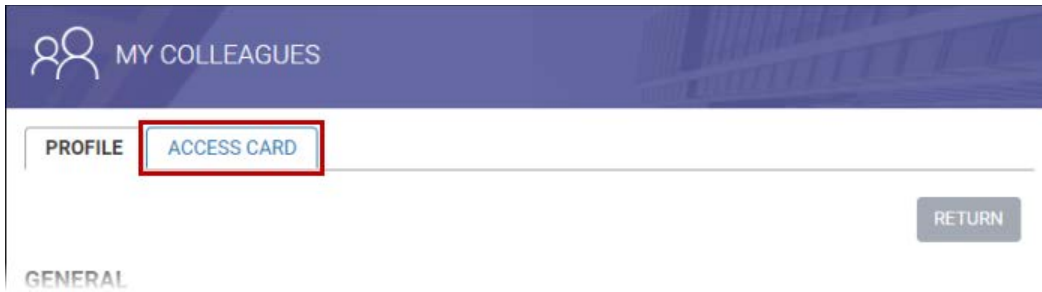


- Select the colleague you would like to modify. The Contact Entry screen will be displayed.
 - You can click the **Search** button (🔍) to display fields that allow you to filter the list by full or partial name, and by Active, Inactive, or all employees (shown below).
 - You can also sort the list in ascending or descending order by clicking on the **Name**, **E-mail**, and **Phone** field headings.

A screenshot of the 'Contact Entry' screen. At the top right is a search icon. Below it is a search filter section with a 'NAME' input field, an 'ACTIVE' dropdown menu set to 'Active', and 'SEARCH' and 'RESET' buttons. Below the filter is a table with columns: Name, E-mail, Phone, and Active. The table contains three rows: Alexandra Lloyd, Bill Paxton (highlighted with a red box), and Jennifer Aimsforth. The 'Active' column shows checkmarks for all three.

Name	E-mail	Phone	Active
Alexandra Lloyd	alloyd@3xngroup.com		✓
Bill Paxton	bpaxton@email.xom	414-555-1212	✓
Jennifer Aimsforth			✓

Depending on the method used by Property Management to handle access cards, the information below may be displayed under a **Profile** tab, and you will see an additional **Access Card** tab (as shown below), which is used to handle initial setup and additional requests related to the colleague's access card. For additional information, see [The Access Card Tab](#) topic.



A breakdown of each section of the Colleague Details screen and the various options available are provided below.

GENERAL

FIRST NAME: Bill
 LAST NAME: Paxton
 PROPERTIES: Mackillop Property
 BUILDING: Mackillop Building
 FLOOR & SUITE: 02
 Active

CONTACT & EMERGENCY INFO

Contact Information

PHONE: 414-555-1212
 FAX:
 E-MAIL: bpaxton@email.xom
 CC:
Emergency Information

PHONE 1: 414-555-1212
 PHONE 2:
 E-MAIL: bpaxton@email.xom
 SMS: 414-555-1212

LOG IN, PERMISSIONS & SUBSCRIPTIONS

USERNAME: bpaxton
 Send email notification to colleague to reset username and/or password

E-Mail Subscriptions Permissions

Send email notification to colleague to reset username and/or password

E-Mail Subscriptions

Please check the following boxes to indicate which email notifications you wish to receive

Requests

- Request Confirmation
- Request Cancelled
- Request in Progress
- Request Delayed
- Request Completed
- Estimate Approval Required
- Billing Reports

Reservations

- Reservation Confirmation
- Reservation Confirmation - Approval Required
- Reservation Approved
- Reservation Rejected
- Reservation Cancelled

Announcements

- Elevator Maintenance
- Employee Announcement
- Fire Drill
- General Announcement

Emergencies

- Emergency Action/Fire Safety
- EMERGENCY NOTIFICATION
- Severe Weather

Permissions

- Can Submit Requests
- Can View All Requests
- Can Submit Reservations
- Can View All Reservations
- Email QR and Reservation Code (Meeting Room Panel)
Last Sent: N/A
- Can Invite Visitors
- Can View All Visits
- Subscribe to Announcements
- Subscribe to Emergencies
- Access to Billing Reports
- Can Access All Properties in Tenant Group

4 { (bracketing the E-Mail Subscriptions section)

5 { (bracketing the Permissions section)

6 ← (arrow pointing to the 'Email QR and Reservation Code' checkbox)

7 → (arrow pointing to the 'SAVE' button)

1. The **General** section contains basic name and location details (First & Last name, Property & Building, Floor & Suite). Edit this information as needed.
 - The **Active** checkbox whether this account can be logged into. When checked, this indicates that the account can be logged into. If you do not want the account to be accessible, you can remove this checkmark, which will set it to Inactive.

2. The **Contact & Emergency Info** section allows you to update daytime and emergency contact information. Emergency contact information is used by Property Management to send emergency notifications.
3. If the colleague already has a username and password set up, then the colleague's username is displayed, but cannot be edited. Placing a checkmark beside **Send email notification...** will send an email to the colleague, providing a link to reset their password (and optionally, their username). If an email address has not been specified, this option will be disabled.
 - If the colleague has never set up a username and password, then checking the above option will send an email with a link to set up a username and password. If an email address has not been specified, this option will be disabled.
4. The **E-Mail Subscriptions** subsection displays the notification types that the colleague is subscribed to. You can change the notifications the account will receive by adding or removing checkmarks beside each notification type.
5. The **Permissions** subsection is used to determine what level of access the account will have. Add or remove checkboxes to determine what the user will have access to in the service portal, such as Service Requests, Visitor Security, and the ability to self-subscribe to announcements.



Depending on the specific administrative permissions you have been given, one or more options in the Permissions section may be inaccessible to you.

6. If your building uses Meeting Room Panels, then this section will appear in the Permissions section, and can only be selected if the colleague has permission to submit reservations. Checking **Email QR and Reservation Code** will send or re-send the code to the email address listed in your colleague's profile.
7. When you are finished making changes, click **Save**.

The Access Card Tab

Depending on the method used by your Property Managers to handle access cards, Tenant Administrators may see an additional **Access Card** tab when viewing their own profile, when viewing a colleague's profile, or when creating a new colleague profile. Under this **Access Card** tab, you can view information related to the profile's building access card, and make service requests related to access cards. See below for additional details.


The screenshot shows a user profile interface with two tabs: 'PROFILE' and 'ACCESS CARD'. The 'ACCESS CARD' tab is active. In the top right corner, there is a red number '4' and a blue button labeled 'NEW ACCESS CARD'. Below this, there is a card for 'ACCESS CARD # 1004257'. The card displays the following information: STATUS: Active, BUILDING ACCESS: Hillview Towers, ACTIVE FROM: Dec 21, 2017, and DEACTIVATION DATE: Dec 21, 2022. To the right of this information is a placeholder for a user's profile picture. At the bottom of the card, there are three buttons: 'Update' (labeled with a red '1'), 'Replace' (labeled with a red '2'), and 'Deactivate' (labeled with a red '3').

1. Click **Update** to request an update to the access card's security level.
 - In the field provided, indicate the access level that the card should have (e.g. Parking, Floor 10) and the time of day that your card should have this access.
 - Click **Save** to send your request to Property Management. A trackable Service Request is also created, allowing you to stay informed on the progress of your request.

The screenshot shows the 'UPDATE ACCESS CARD # 1004257' form. On the left side, there is a placeholder for a user's profile picture. To the right, the form displays the following information: BUILDING: Hillview Towers, DEACTIVATION DATE: Dec 21, 2022. Below this, there is a section titled 'Please describe the floors and access this individual requires' with a large text input field. At the bottom of the form, there is a note: 'Note: After clicking Save, a request to update this access card will be sent to the Property Management Office'. Below the note are two buttons: 'SAVE' (blue) and 'CANCEL' (grey).

2. Click **Replace** to request a replacement access card. Upon submission of this request, the existing access card will be immediately deactivated.
 - If your company has a supply of access cards to use as replacements, select **Assign Card Number** and enter the number on the access card. Otherwise, select **New card required**.
 - In the field provided, indicate the access level that the card should have (e.g. Parking, Floor 10) and the time of day that your card should have this access.
 - If your access cards include photo ID, click **Upload Photo** to include a photograph. Please note the photograph guidelines listed on-screen to ensure that your picture will be acceptable.
 - Click **Save** to send your request to Property Management. A trackable Service Request is also created, allowing you to stay informed on the progress of your request.

REPLACE ACCESS CARD # 1004257



Upload Photo

BUILDING: Hillview Towers

DEACTIVATION DATE: Dec 21, 2022

Access Card

New card required

Assign Card Number

1004299

Please describe the floors and access this individual requires

Parking, Floor 10, 8am-6pm

Please ensure:

- The photo is focused with the correct orientation
- The person is front-facing, has open eyes, and is not wearing a hat
- The photo type is a JPG, GIF, PNG, or BMP file
- The photo is less than 5MB


Note: After clicking Save, the existing card will be DEACTIVATED IMMEDIATELY and a request for a new access card will be created

SAVECANCEL

3. Click **Deactivate** to request deactivation of a card. Please note that this option does not include a request for a replacement card.
 - You can either select **Deactivate Immediately**, or a future date for the card to be deactivated.
 - Enter a **Reason** for the deactivation in the dropdown provided.
 - If you select **Terminated** as the reason for deactivation, then you will need to provide additional information concerning the termination in an additional field. This information will be passed along to the security desk.


- Click **Save**. The will be automatically deactivated on the specified date.
 - If there are no other active cards associated with the account, then a popup will ask if you would also like to deactivate the account. Click **Yes** if you would like to deactivate it. You can also manually deactivate accounts, as described in [Deactivating a Colleague](#).

DEACTIVATE ACCESS CARD # 1004257



Deactivation Date

Deactivate card immediately



Reason

Note: After clicking Save, the new deactivation date will take effect

SAVE
CANCEL

4. Click **New Access Card** to request a new access card. If the profile you are viewing currently has no access card, then this will be the only option available to you.
 - If your company has a supply of access cards to use as replacements, select **Assign Card Number** and enter the number on the access card. Otherwise, select **New card required**.
 - Select the **Building** that the card should have access to.
 - Indicate if this is a **Permanent** or **Temporary** card.
 - Enter an activation date using the **Active From** field (default is today). If this is a temporary card, you will also need to enter a **Deactivation Date**.
 - In the field provided, indicate the access level that the card should have (e.g. Parking, Floor 10) and the time of day that the card should have this access.
 - If your access cards include photo ID, click **Upload Photo** to include a photograph. Please note the photograph guidelines listed on-screen to ensure that your picture will be acceptable.
 - Click **Save** to send your request to Property Management. A trackable Service Request is also created, allowing you to stay informed on the progress of your request.

Card Number

- New card required
- Assign Card Number

100745

Building:

Hillview Towers

Access Card

- Permanent
- Temporary

Active From:

1/16/2018

Please describe the floors and access this individual requires

Parking, Floor 10, 8am-6pm

Note: After clicking Save, a request for a new access card will be sent to the Property Management Office

SAVE

CANCEL



Upload Photo

- Please ensure:
- The photo is focused with the correct orientation
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 - The photo is less than 5MB

Deleting a Colleague

Colleagues cannot be deleted; however, you can deactivate them, which disables the account. See [Deactivating a Colleague](#).

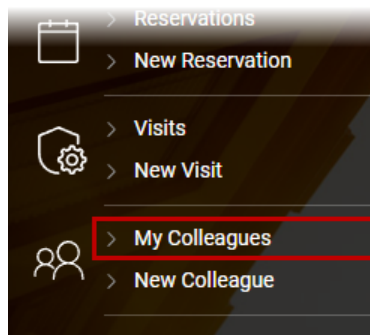
Deactivating a Colleague




Only Tenant Administrators and Property Management can deactivate accounts. If your company does not have a Tenant Administrator account to perform this activity, contact your Property Management office to deactivate a colleague's account.

When an colleague's account is no longer required, it should be deactivated. In order to maintain the integrity of Service Request histories, accounts cannot be deleted. Accounts are deactivated in the Colleague Details screen. To deactivate an account, follow the steps below:

1. Click **My Colleagues** on the navigation menu to display the My Colleagues list.



2. Select the colleague you would like to deactivate. The Colleague Details screen will be displayed.
 - o You can click the **Search** button () to display fields that allow you to filter the list by full or partial name, and by Active, Inactive, or all employees (shown below).
 - o You can also sort the list in ascending or descending order by clicking on the **Name**, **E-mail**, and **Phone** field headings.

The screenshot shows the Colleague Details screen. At the top right is a search icon. Below it is a search filter section with a text input labeled 'NAME' and a dropdown menu labeled 'ACTIVE' with 'Active' selected. There are 'SEARCH' and 'RESET' buttons. Below the filters is a table with columns: Name, E-mail, Phone, and Active. The first row is highlighted with a red border.

Name	E-mail	Phone	Active
Alexandra Lloyd	alloyd@3xngroup.com		✓
Bill Paxton	bpaxton@email.xom	414-555-1212	✓
Jennifer Aimsforth			✓

3. In the **General** section, remove the checkmark beside **Active**.

[RETURN](#)

GENERAL

FIRST NAME	LAST NAME	PROPERTIES	BUILDING
<input type="text" value="Alexandra"/>	<input type="text" value="Lloyd"/>	<input style="background-color: #f0f0f0;" type="text" value="Corporate Center"/>	<input type="text" value="North Tower"/>
FLOOR & SUITE	<input type="checkbox"/> Active		
<input type="text" value="01, 102"/>			

CONTACT & EMERGENCY INFO

4. Click **Save**. The account is now deactivated, and cannot be used to log into the Service Portal.