

# *T* *raining* *g* *u* *i *d* *e**

## Mobile Service Requests

**ONESITE**  **FACILITIES**

RealPage, Inc.  
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# Welcome to Mobile Service Requests

OneSite Mobile Service Requests works in conjunction with OneSite Facilities, allowing property maintenance personnel to manage service requests in the field using Pocket PC handheld devices. The Pocket PCs enable service technicians and managers to receive make ready requests and service requests, add service requests, record time spent on administrative and maintenance activities, and automatically update information in OneSite Facilities.

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## Keeping Field Technicians and the Office in Sync

The ability of the Pocket PCs to synchronize with OneSite Facilities keeps information in both OneSite Mobile Service Requests and OneSite Facilities up-to-date and accurate. Technicians are instantly aware of new tasks, and the home office stays apprised of the statuses of all maintenance activities. Office personnel know which technicians are busy and which ones are currently available for new assignments.

Property management companies can request technicians to synchronize as often as necessary, or they can set up Mobile Service Requests to automatically synchronize every 15 minutes. Pocket PCs can synchronize with Facilities over the Internet through docking stations or over wireless connections.

## Automatic Time-Tracking

Mobile Service Requests allows field technicians to record information on the job and allows the home office to act on that information quickly. The system monitors each moment of a technician’s work day, from clock-in to clock-out. Time spent on service requests is automatically tracked as technicians start, pause, and complete projects during the course of their work days. OneSite Facilities calculates overall project time; if a technician is interrupted, the system records the reason for the pause and calculates the total time of each activity.

Since the time stamp occurs automatically in the course of a technician logging daily activities, there is no need for technicians to calculate separate records of time spent on projects.

This time-tracking data becomes available for resource management by way of Facilities reporting. It also becomes immediately available to the office whenever

property maintenance technicians synchronize their Pocket PCs with the office personal computer. This way, office personnel can know what resources they have available for maintenance assignments.

## Prerequisites to Using Mobile Service Requests

For a property to use Mobile Service Requests, the functionality must be turned on for the property. This task is performed by RealPage implementation personnel.

You will also need to ensure that a property's maintenance technicians are set up as OneSite users and are assigned to technician roles in Facilities.

## Adding Mobile Service Request Users

Follow the steps below to set up Mobile Service Requests users in OneSite.

1. At the top of the OneSite page, next to the property name, click **Change**, and then click the **Go to RealPage Central** button.
2. Click the **Administration** tab.
3. In the *Manage* section, click **Users** to open the **Manage users** page.
4. Select the **Users** option.
5. Create OneSite user sign-ons for all people who will use Mobile Service Requests.

---

Ensure that every maintenance technician who will be using Mobile Service Requests is set up in OneSite with a role of Property Maintenance Worker, Property Maintenance Lead, and/or Property Maintenance Manager, as appropriate. These are the only three roles that can be used with Mobile Service Requests.

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6. Click the **Change** link at the top of the OneSite page, and navigate back to the property.
7. Click the **Administration** tab. In the *Facilities* section, select **Maintenance staff**.
8. Select **Manage technicians**.
9. Click **Add** (or select an existing worker and click **Edit**).
10. In the **Technician** box, add the user's name.
11. In the OneSite user name field, click the drop-down arrow and select the OneSite name you created for the user in step 5, above.
12. Assign the user to one or more work groups, and then click **Add**.
13. Repeat these steps for every user you wish to have access to Mobile Service Requests.
14. The user can now sign on to Mobile Service Requests with his or her OneSite user name and password and start using Mobile Service Requests.

# Roles and Rights

Mobile Service Requests works in concert with OneSite Facilities to add, assign, track, and complete service requests. Much of the functionality built into Mobile Service Requests is controlled by specific rights assigned to each mobile user in OneSite user management.

In general, Mobile Service Requests is tailored for three different roles: property maintenance technicians and service leads, and managers. These correspond to the standard OneSite roles of Property Maintenance Worker, Property Maintenance Lead, and Property Maintenance Manager. These roles control what the person can do both on the Pocket PC and in OneSite Facilities and other OneSite product centers. All of the rights associated with each of these standard roles are detailed in the following sections.

## Summary of Roles in Mobile Service Requests

The following table identifies what Mobile Service Requests functionality is available to each of the three standard OneSite roles. Note that the Property Maintenance Lead and the Property Maintenance Manager have exactly the same access in Mobile Service Requests. The difference between these two roles is in OneSite Facilities.

<b>Task</b>	<b>MW</b>	<b>ML</b>	<b>MM</b>
<i>Setup/Synchronize Tasks</i>			
Option to see all of Mobile Service Requests in Spanish or English	✓	✓	✓
Option to see make ready requests that include at least one service request assigned to you	✓	✓	✓
Option to see all make ready requests that include at least one In progress or On hold service request		✓	✓
<i>Service Request Tasks</i>			
Work with all service requests that are assigned to you	✓	✓	✓
Work with all service requests		✓	✓
Sort service requests list by location, priority, status, or service request number	✓	✓	✓
Sort service requests list by technician		✓	✓
Filter service requests list to show only service requests, only make ready service requests, or both	✓	✓	✓
Filter service requests list to show only the service requests assigned to you or only unassigned service requests		✓	✓

Task		MW	ML	MM
	Find service requests by unit number or common area, priority, or status	✓	✓	✓
	Find service requests by technician		✓	✓
	View details for any available service request	✓	✓	✓
	Assign one or more service requests to a technician		✓	✓
	Record a service action for any available service request, including entering a time worked comment and changing the status to On hold, Canceled, or Complete	✓	✓	✓
	Option to assign a service request to yourself and record a service action, or record a service action without assigning the request to yourself		✓	✓
	Pause and restart time-recording for an In progress service request	✓	✓	✓
	Add a service request and related requests		✓	✓
<i>Make Ready Request Tasks</i>				
	Work with all make ready requests that have at least one service issue assigned to you	✓	✓	✓
	Work with all make ready requests		✓	✓
	View all service requests in a make ready that are assigned to you	✓	✓	✓
	View all service requests in a make ready		✓	✓
	Sort make ready request list by location, move-out date, or move-in date.	✓	✓	✓
	Mark a make ready as Complete, changing the status of all On hold and In progress service requests to complete		✓	✓
	Record a service action for any available make ready service request, including entering a service comment and changing the status to On hold, Canceled, or Complete	✓	✓	✓

### Custom Roles and Rights

OneSite also allows your company to create custom roles, granting access to exactly the features and functions your users need to perform their jobs. If your company uses custom roles, be aware of the specific rights that allow access to particular functionality within Mobile Service Requests. These two rights are assigned to the Property Maintenance Manager and Property Maintenance Lead roles and not to the Property Maintenance Worker role.

- "Can view all service requests": This right controls several things in Mobile Service requests:
  - With this right, the button name to work with service requests displays as **Service requests**. Without this right, the button name displays as **My service requests**.
  - With this right, Mobile users can see all service requests (assigned and unassigned). Without this right, users see only those service requests that are assigned to them.
  - With this right, Mobile users have the **Assign** button at the **Service requests** list, allowing them to assign a technician to any service request that is unassigned. The **Assign** button appears at the regular **Service requests** list and when you choose to **View issues** for a make ready request.
  - With this right, Mobile users have the option to sort service requests by Technician (in addition to sorting by Location, Status, Priority, and Service request number).
- "Close make ready": This right controls whether the **Complete MR** button appears at the **Make ready requests** list. With this right, the button is available; without this right, the button is not available.

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 Property Maintenance Manager Role..... 7

## Property Maintenance Worker Role

The Property Maintenance Worker role allows a maintenance worker to view service requests and make ready requests, to complete service requests, and to print Facilities reports.

The rights associated with this role are listed below, categorized by OneSite product center. The actual name of each right as it is displayed in the system is listed. In some cases, entries are followed by additional explanation in parentheses.

### Facilities Product Center Rights

- Add and view asset records (also grants access to **Asset makes**, **Asset colors**, **Asset conditions**, and **Import assets** on the **Administration** tab)
- Can manage assets (do not use – this right has been replaced by the new View, Add, and Edit asset rights and will soon be deleted)
- Close service requests
- Edit and view asset records (also grants access to **Asset makes**, **Asset colors**, **Asset conditions**, and **Import assets** on the **Administration** tab)
- Edit and view service requests

- View facilities tab (do not use – this right has been replaced by rights to view the individual sub-tabs in Facilities and will soon be deleted)
- View asset records (also grants access to **Asset makes**, **Asset colors**, and **Asset conditions**, on the **Administration** tab)
- View make ready
- View service requests

### **Learning Rights**

- Use "Print" function button
- View Class Description (osl-002-001) - Use "Description" function button/View Related Classes from Class Description Page
- View Find a Class page/Search Catalog (osl-003-001) - use "Find" function
- View Learning Page - (osl-001-001)
- View Learning Tour from Learning Page (osl-001-001)
- View My Classes Page (osl-007-001)
- View New Classes from Learning Page (osl-001-001)

### **Leasing & Rents Product Center Rights**

- Print Screening report(s)

### **Screening Product Center Rights**

- Access Screening homepage

## **Property Maintenance Lead Role**

The Property Maintenance Lead role allows you to enter, update, cancel, complete, and close make ready requests and service requests, and to print Facilities reports. These are the same permissions as the Property Maintenance Manager role, with the exception of managing work groups and modifying product center settings.

The rights associated with this role are listed below, categorized by OneSite product center. The actual name of each right as it is displayed in the system is listed. In some cases, entries are followed by additional explanation in parentheses.

### **Facilities Product Center Rights**

- Add and view asset records (also grants access to **Asset makes**, **Asset colors**, **Asset conditions**, and **Import assets** on the **Administration** tab)
- Add and view make ready request
- Add and view service requests (also grants access to **Recurring service requests** on the **Administration** tab)
- Can manage assets (do not use – this right has been replaced by the new View, Add, and Edit asset rights and will soon be deleted)

- Can view all service requests (can view service requests assigned to other people using Mobile Service Requests)
- Cancel service requests
- Close make ready
- Close service requests
- Edit and view asset records (also grants access to **Asset makes**, **Asset colors**, **Asset conditions**, and **Import assets** on the **Administration** tab)
- Edit and view make ready requests
- Edit and view service requests
- Edit time sheets for all technicians (only used in setup)
- Facilities reports
- Undo make ready
- View asset records (also grants access to **Asset makes**, **Asset colors**, and **Asset conditions**, on the **Administration** tab)
- View facilities tab (do not use – this right has been replaced by rights to view the individual sub-tabs in Facilities and will soon be deleted)
- View make ready
- View service requests

### **Learning Rights**

- Use "Print" function button
- View Class Description (osl-002-001) - Use "Description" function button/View Related Classes from Class Description Page
- View Find a Class page/Search Catalog (osl-003-001) - use "Find" function
- View Learning Page - (osl-001-001)
- View Learning Tour from Learning Page (osl-001-001)
- View My Classes Page (osl-007-001)
- View New Classes from Learning Page (osl-001-001)

### **Leasing & Rents Product Center Rights**

- Print Screening report(s)

### **Screening Product Center Rights**

- Access Screening homepage

## **Property Maintenance Manager Role**

The Property Maintenance Manager role allows you to enter, update, cancel, complete, and close make ready requests and service requests, and to print Facilities

reports. In addition, the Maintenance Manager can manage technicians and work groups.

The rights associated with this role are listed below, categorized by OneSite product center. The actual name of each right as it is displayed in the system is listed. In some cases, entries are followed by additional explanation in parentheses.

### Facilities Product Center Rights

- Add and view asset records (also grants access to **Asset makes**, **Asset colors**, **Asset conditions**, and **Import assets** on the **Administration** tab)
- Add and view make ready requests
- Add and view service requests (also grants access to **Recurring service requests** on the **Administration** tab)
- Add asset records from Purchasing (add an asset from an invoice line item in Purchasing)
- Can enter service request complete date
- Can manage assets (do not use – this right has been replaced by the new View, Add, and Edit asset rights and will soon be deleted)
- Can view all service requests (only used with mobile service requests)
- Cancel service requests
- Close make ready
- Close service requests
- Edit and view asset records (also grants access to **Asset makes**, **Asset colors**, **Asset conditions**, and **Import assets** on the **Administration** tab)
- Edit and view make ready requests
- Edit and view service requests
- Edit manage work groups (only used in setup)
- Edit time sheets for all technicians (only used in setup)
- Facilities reports
- Undo make ready
- View facilities tab (do not use – this right has been replaced by rights to view the individual sub-tabs in Facilities and will soon be deleted)
- View asset records (also grants access to **Asset makes**, **Asset colors**, and **Asset conditions**, on the **Administration** tab)
- View make ready
- View service requests

### **Learning Rights**

- Use "Print" function button
- View Class Description (osl-002-001) - Use "Description" function button/View Related Classes from Class Description Page
- View Find a Class page/Search Catalog (osl-003-001) - use "Find" function
- View Learning Page - (osl-001-001)
- View Learning Tour from Learning Page (osl-001-001)
- View My Classes Page (osl-007-001)
- View New Classes from Learning Page (osl-001-001)

### **Leasing & Rents Product Center Rights**

- Print Screening report(s)

### **Screening Product Center Rights**

- Access Screening homepage



# Options and Setup

**Options** and **Setup** allow you to configure Mobile Service Request settings that will be in effect every time you use the unit—unless you decide to change the settings or if another user signs on to Mobile Service Requests from the same Pocket PC.

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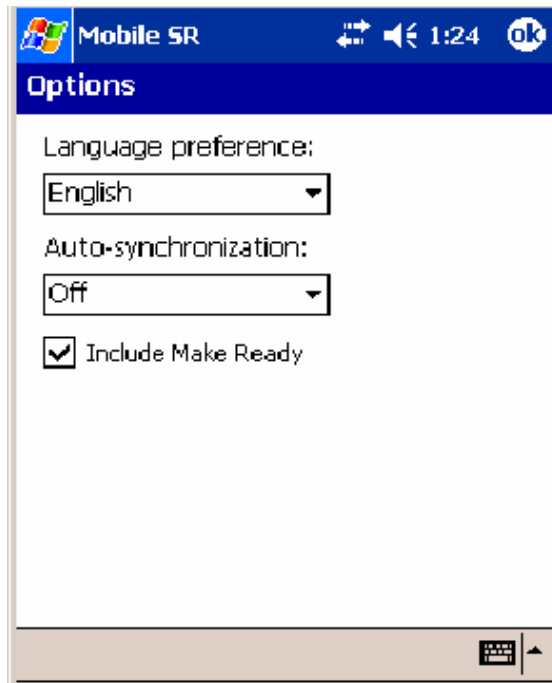
## Choosing Options

**Options** allow you to choose language preference and synchronization settings.

1. At the main menu, click **Options**.



2. The **Options** window opens. Select the **Language preference**. Mobile Service Requests will display service requests and make ready requests in the language you select.



3. Select an **Auto-synchronization** option. If you want Mobile Service Requests to automatically synchronize every 15 minutes, select **On**. If you want to manually initiate synchronization, select **Off**. For more information on synchronizing manually, see **Synchronizing Mobile Service Requests** (on page 19).
4. Tap the **Include Make Ready** option if you want to work with make ready requests in addition to regular and recurring service requests.
5. After selecting your options, tap **OK** in the upper-right corner to return to the main menu.

## About Synchronization

Synchronization is the process by which the Pocket PC periodically “checks in” with the OneSite Facilities server to upload and download service requests and make ready requests.

The Pocket PC requires an Internet connection in order to synchronize. Your Pocket PC can access the Internet when docked to a computer with Internet access, or through a wireless connection to the Internet.

When you synchronize:

- The Pocket PC sends information to the Facilities server. This includes any changes made to existing service requests and make ready requests and any new service requests entered since the last synchronization. This makes Pocket PC information viewable within OneSite Facilities at the property office.

- The Pocket PCs receive information entered into Facilities from the property office, including changes made to existing service requests and make ready requests and any new service requests and make ready requests entered since the last synchronization.

After synchronization, both the office computer and the Pocket PCs will have the latest information on current facilities maintenance tasks.

## Setup

**Setup** allows you to sign on, tell Mobile Service Requests what property you are working on, and select what type of service requests you wish to download. Once it knows who you are and the property you are working on, it exchanges key property information with the OneSite Facilities server and downloads service requests into your Pocket PC.



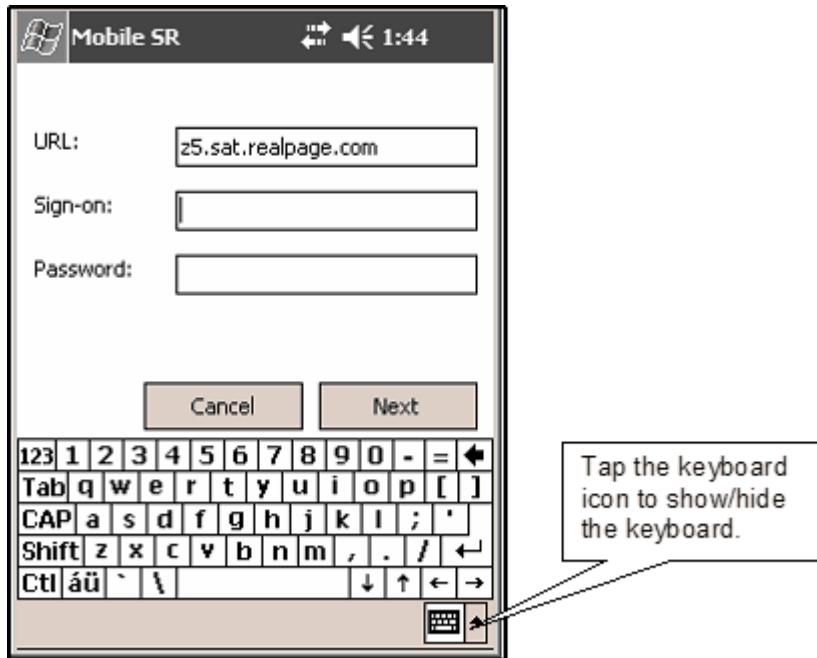
Use **Setup** when:

- You are signing onto Mobile Service Requests for the first time after installing it.
- You are signing onto a different property than the one you worked on last.
- You are signing on as a different user on a Pocket PC.
- You know that the OneSite Facilities setup information for your property has changed (for example, if a new technician or new common area has been added).

## Setting Up Mobile Service Requests

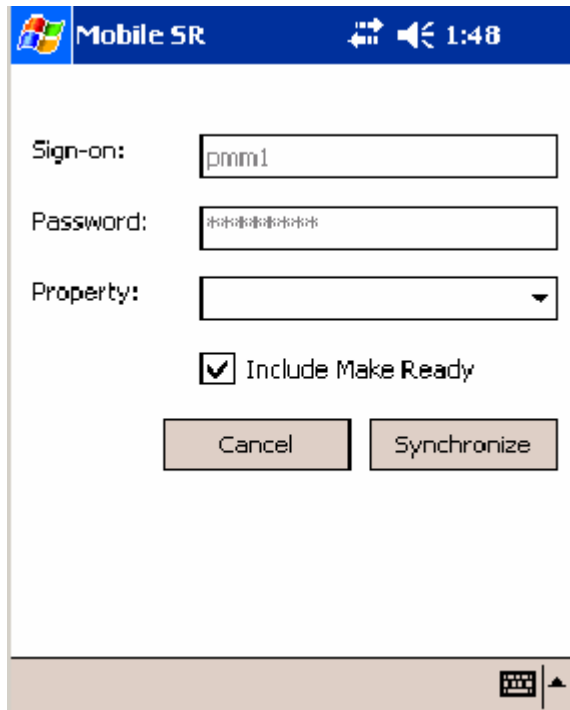
1. Place your Pocket PC in its docking port (if it is not connected to the Internet by a wireless system).
2. Make sure Microsoft ActiveSync is running.

3. Tap the **Start** button.
4. Select **Mobile SR** from the menu. The Mobile Service Requests main menu opens.
5. Tap the **Setup** button. The **Setup** window opens.



6. Enter your OneSite URL (without the http:// at the beginning).
7. Enter your sign-on ID.
8. Enter your password.

9. Tap **Next**. The **Synchronize** window opens.



Mobile SR

Sign-on: pmm1

Password: \*\*\*\*\*

Property: ▾

Include Make Ready

Cancel Synchronize

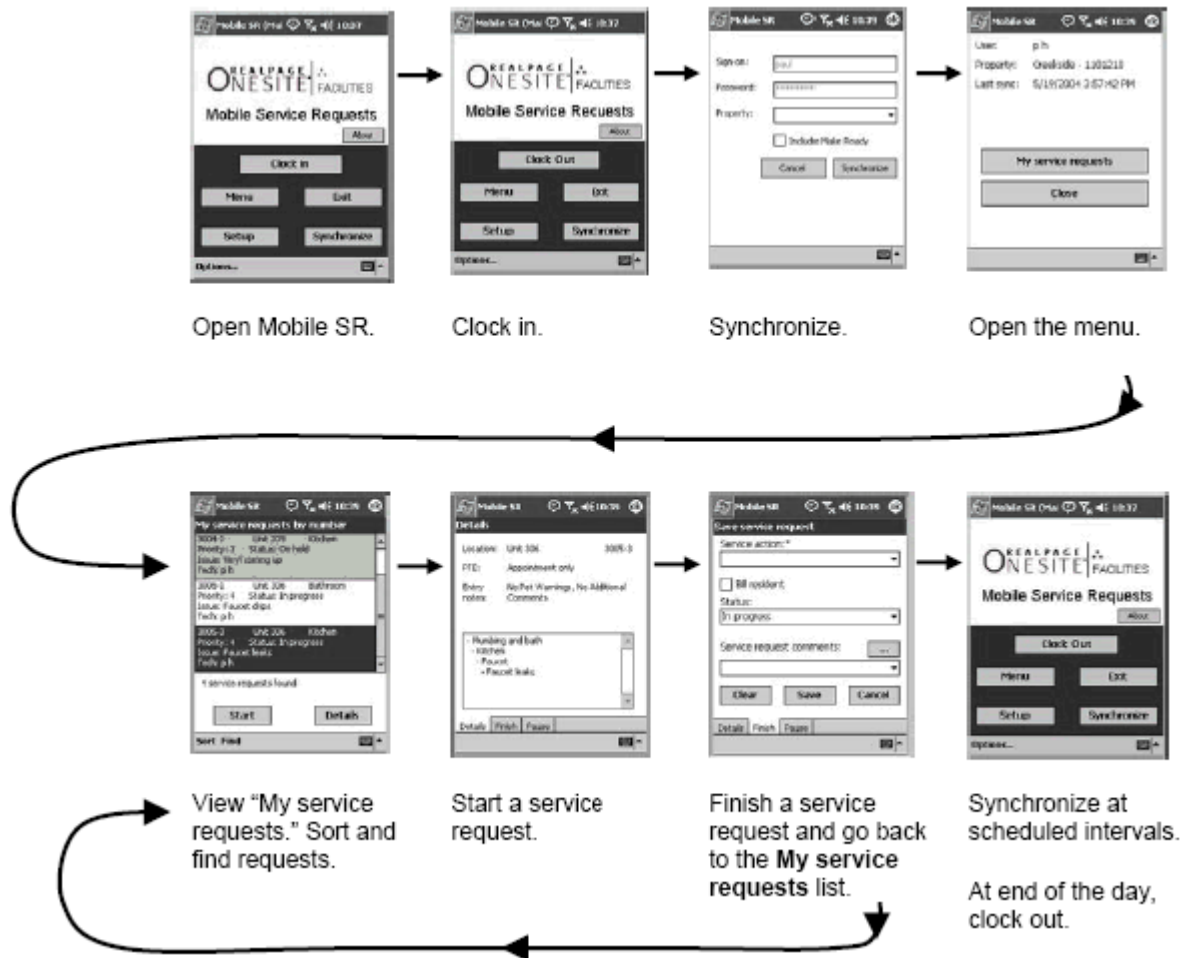
10. Select the property you are working with in the current session.
11. Select the **Include Make Ready** check box if you want to download make ready service requests onto your Pocket PC.
12. Tap the **Synchronize** button. The **Running setup** progress bar displays. This indicates that the Pocket PC is synchronizing with OneSite Facilities and is receiving service requests from the OneSite server.
13. When the **Setup complete** message displays, tap the **OK** button to return to the main menu. You are now ready to start working on service requests.



## CHAPTER 4

# Daily Workflow Overview

The chart below provides a general overview of daily workflow using Mobile Service Requests. When you first open Mobile Service Requests, you see the main menu.



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## Clocking In for the Day

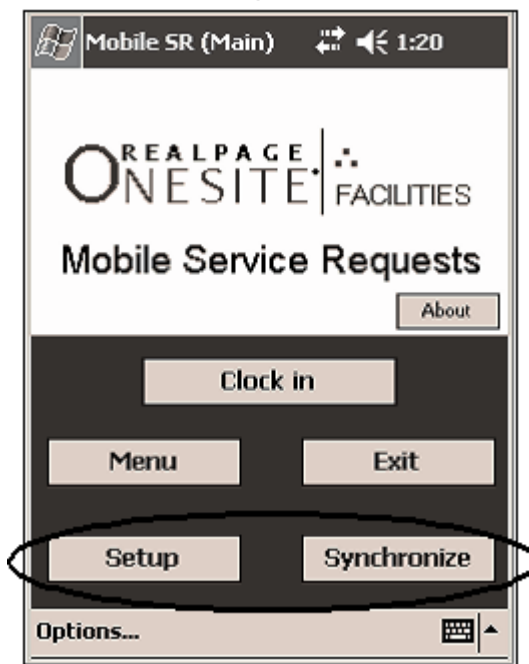
1. Tap the **Clock in** button on the Mobile Service Requests main window when you first begin your work day.
2. Tap the **Clock out** button when you complete your work day. The **Clock in** button toggles between **Clock in** and **Clock out**. Tapping this button logs the time on the Pocket PC and sends it to the database for your timesheets.

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You can only clock in and clock out once per day.

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## Setting Up or Synchronizing?



- If you are signing onto Mobile Service Requests for the first time, or someone else was using Mobile Service Requests on the same Pocket PC before you, you will need to run **Setup** at the beginning of the day. **Setup** will download service requests for the particular user and property. See **Setting Up Mobile Service Requests** (on page 13) for more information.
- If no one else has used the Pocket PC for Mobile Service Requests since you last used it, start your day by synchronizing. Synchronize sends information from the Pocket PC to the OneSite Facilities server and downloads new and updated service requests. You will want to synchronize at regular intervals throughout the day to make sure your Pocket PC has the latest service request information and to make the latest information available to the office computer.

## Synchronizing Mobile Service Requests

Your Pocket PC can synchronize with OneSite automatically and manually.

Automatic synchronization must be chosen as an option in the **Mobile Service Requests Options** (on page 11) window. Once set up, this option requires no user action—the Pocket PC automatically synchronizes every 15 minutes, provided it is connected to the Internet.

To synchronize manually, follow the steps below.

1. Ensure that your Pocket PC is connected to the Internet by way of a docking station or wireless network.
2. Make sure Microsoft ActiveSync is running.
3. Tap the **Synchronize** button. The **Synchronize** window opens.

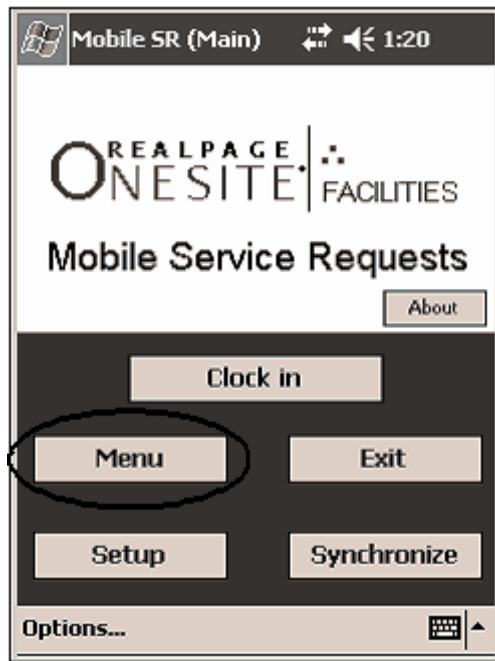
The screenshot shows a mobile application window titled "Mobile SR". The window contains the following elements:

- Header:** A blue bar with the Windows logo on the left, the text "Mobile SR" in the center, and a battery icon with "1:48" on the right.
- Sign-on:** A text input field containing "pmm1".
- Password:** A text input field with masked characters (asterisks).
- Property:** A dropdown menu with a downward-pointing arrow.
- Include Make Ready:** A checkbox that is checked.
- Buttons:** Two buttons at the bottom: "Cancel" and "Synchronize".
- Status Bar:** A small bar at the bottom right of the screen showing a battery icon and a signal strength indicator.

4. The Pocket PC remembers your sign-on ID from setup and is read-only. If you need to change it, tap **Cancel** and go to **Setup**.
5. Your password is not remembered from setup. Enter your password.
6. Select the property you are working on.
7. Select **Include Make Ready** if you want to download make ready service requests onto your Pocket PC.
8. Tap the **Synchronize** button.
9. A progress bar displays while synchronization is underway. When it is finished, a “Synchronization complete” message displays. Tap the **OK** button to proceed to the Mobile Service Requests main menu.

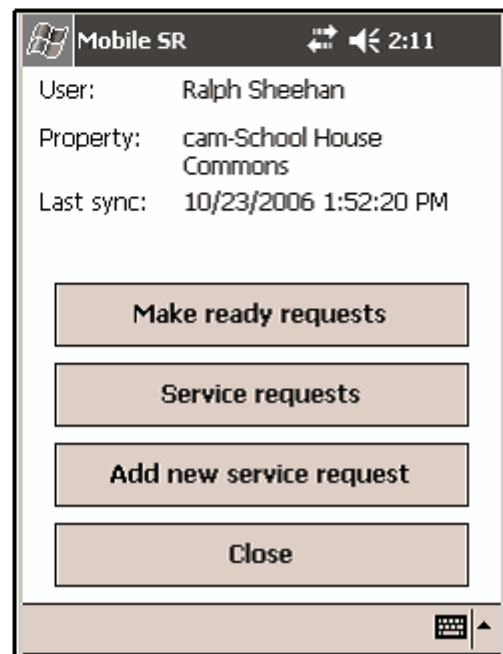
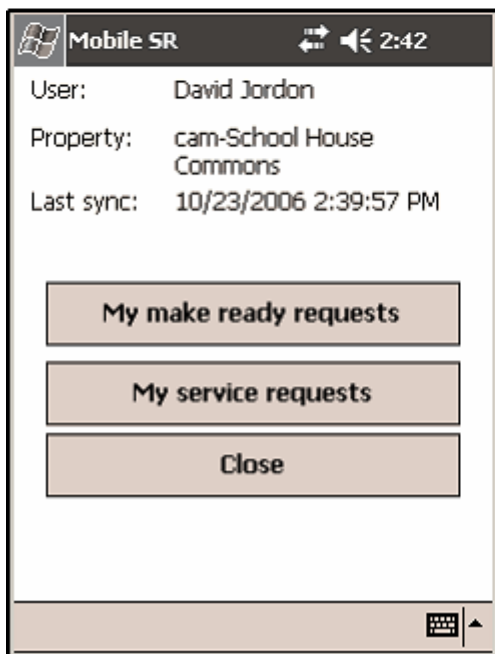
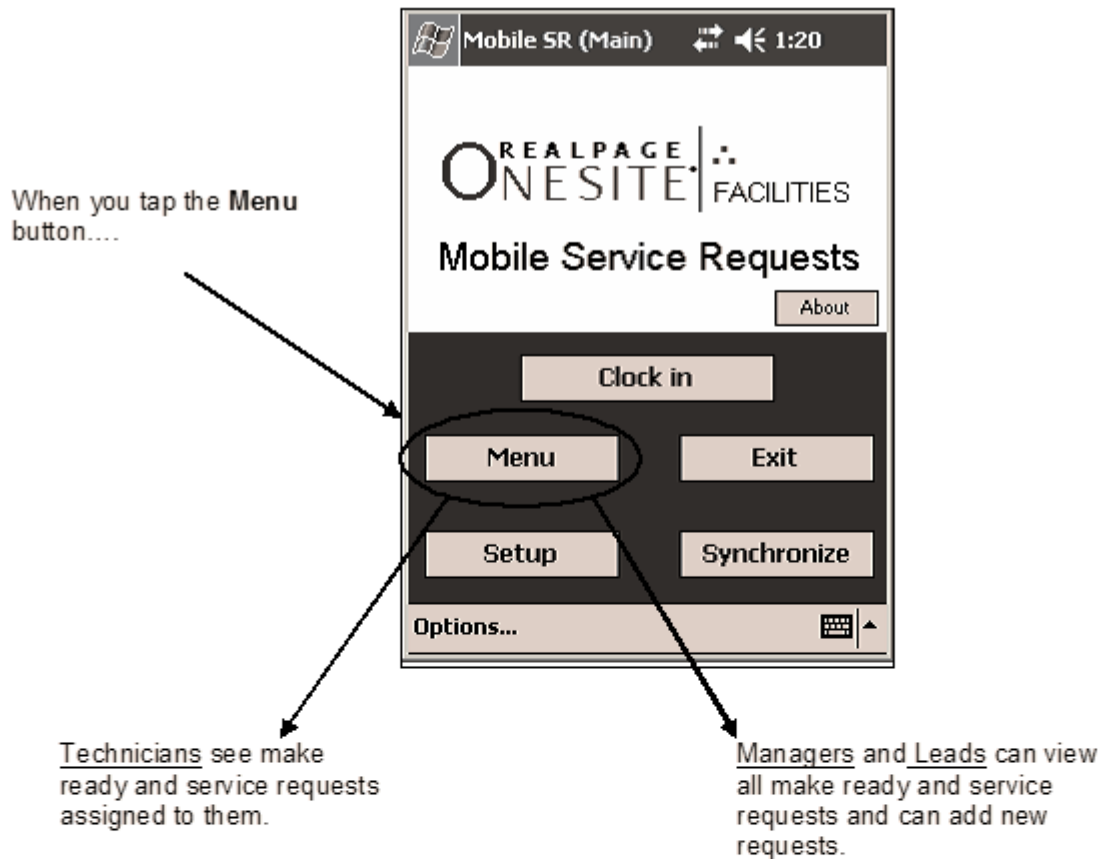
## Viewing Your Service Requests

Tap the **Menu** button to view service requests.



- If you are a service technician, tapping the **Menu** button displays buttons to view **My make ready requests**, view **My service requests**, and **Close**. Clicking **My make ready requests** opens the **Make ready requests** window, which displays make ready requests that are assigned to you. Clicking **My service requests** opens the **My service requests** window, which displays service requests that are assigned to you.
- If you are a service lead or service manager, tapping the **Menu** button displays buttons for **Make ready requests**, **Service requests**, **Add new service request**, and **Close**. Clicking **Make ready requests** opens the **All make ready requests** window, which displays all make ready requests that are open and assigned, open and unassigned, and on hold. Clicking the **Service requests** button opens the **All service requests** window, which displays all service requests that are open and

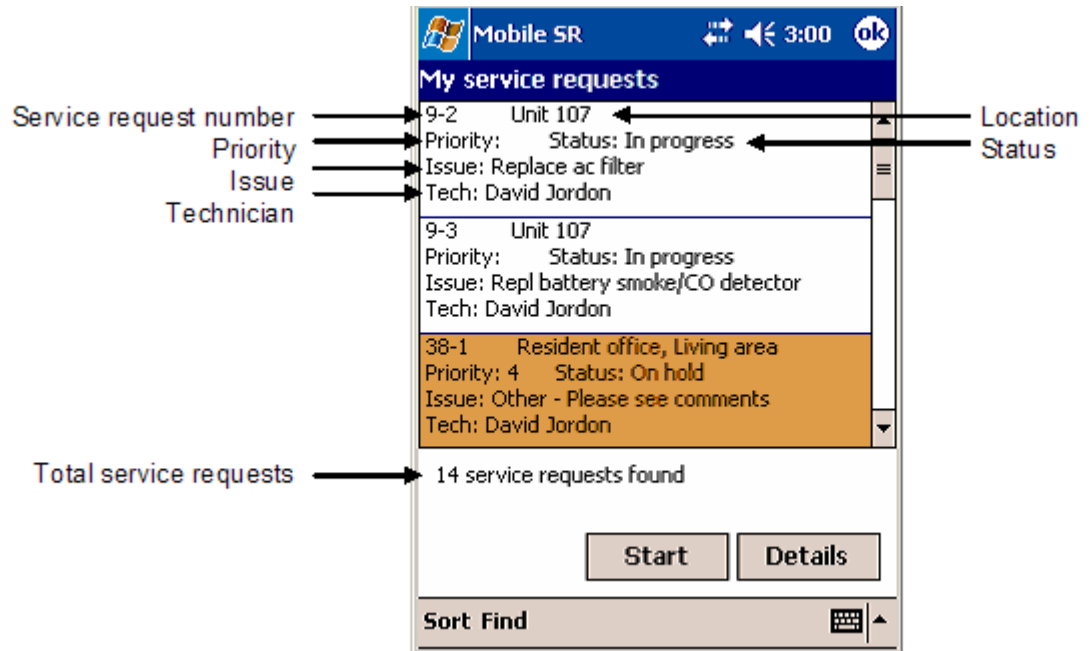
assigned, open and unassigned, and on hold. **Add new service request** allows you to enter a new request.



The **Make ready requests** options only appear if you chose the option to **Include make ready** at **Setup** or **Synchronization**.

## The Service Requests List

The **My service requests** button opens a window listing all service requests assigned to the technician signed onto Mobile Service Requests.



The **My service requests** window displays the following service request details:

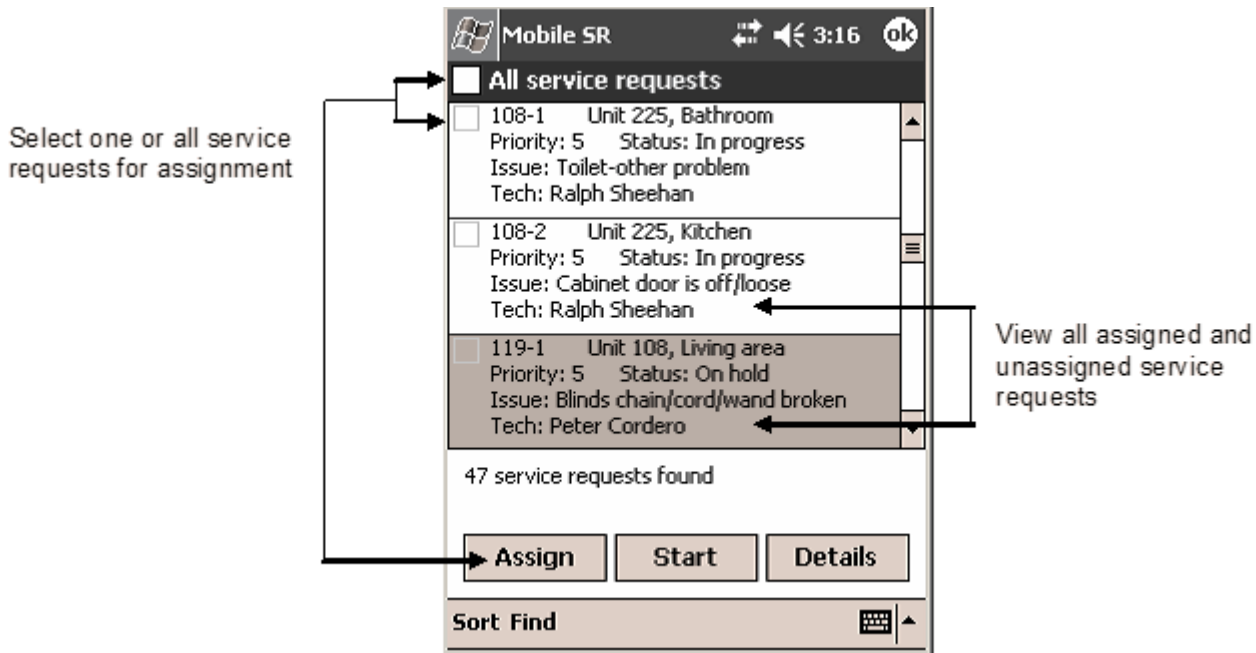
- Service request number
- Location requiring service (unit or common area)
- The service request's priority
- The service request's status
- The issue that needs to be addressed
- The maintenance technician assigned to the service request
- The total number of service requests assigned

In addition, you have the following buttons and options in the **My service requests** window:

- **Sort:** This option allows you to list the service requests in a different order.
- **Find:** This option allows you to search for specific service requests.
- **Start:** This option also takes you to the service request details window, but also provides **Finish** and **Pause** tabs. When you click the **Start** button, Mobile Service Requests begins tracking the time you spend resolving the issue. (See **Working with Service Requests** (on page 29) for information on completing a service request.)
- **Details:** This option allows you to view the service requests details.

## Manager and Lead View

If you are a manager or a lead, the **All service requests** list provides all of the options shown above, but includes all service requests (not just those assigned to you) and the option to **Assign** one or more service requests to a technician. Tasks that only a manager or lead can perform are detailed in the **Service Request Management** chapter (on page 41).



## Sorting and Finding Service Requests

Before you start working on any service requests, you might want to sort and search them to see which ones are the highest priorities.

- **Sort** displays all service requests, listed in order by a value you select.
- **Find** displays only those service requests that have a value you specify.

### To Sort Service Requests:

1. Tap the word **Sort** at the bottom of the **Service requests** window. A new window opens displaying the types of information you can sort by, with a check mark beside the value they are sorted by currently. You have the option to sort by location, priority, status, or service request number. Managers and leads also have the option to sort by the technician's name.
2. Tap the type of information you would like to sort by.
3. The list redisplay, sorted in ascending order by that type of information.

### To Find Service Requests:

1. Tap the word **Find** at the bottom of the window listing service requests. This opens a menu with four options: **Advanced find**, **Select all**, **Exclude make ready**, and **Make ready only**.




---

If you are a manager or a lead, you also have the **Find** option to search for those requests assigned to you and for unassigned requests.

---

- **Select all** prompts Mobile Service Requests to display every active service request assigned to you.
- **Exclude make ready** displays the list of service requests assigned to you, but leaves out any service issues that are part of a make ready request. (This option is available only if you chose to **Include make ready** at **Setup** or **Synchronize**.)
- **Make ready only** displays the list of service requests assigned to you, but includes only those service issues that are part of a make ready request. (This option is available only if you chose to **Include make ready** at **Setup** or **Synchronize**.)
- **Advanced find** opens a window that allows you to define the criteria you wish to search for service requests by. You can find all service requests assigned to a specific unit or common area, or that have a specific priority or status.

In the **Advanced find** window, tap the drop-down arrow in the **Find by** field and select the type of information you wish to filter by. Then, depending on the **Find by** value you select, narrow your search further as follows:

- **Unit** allows you to select the building, if applicable, and the unit you want to find requests for.
- **Common area** allows you to find requests that pertain to only one common area of the property (for example, the clubhouse or laundry area).
- **Priority** allows you to view service requests of only a certain priority (for example, all high-priority requests).
- **Status** allows you to view only requests of a certain status.

---

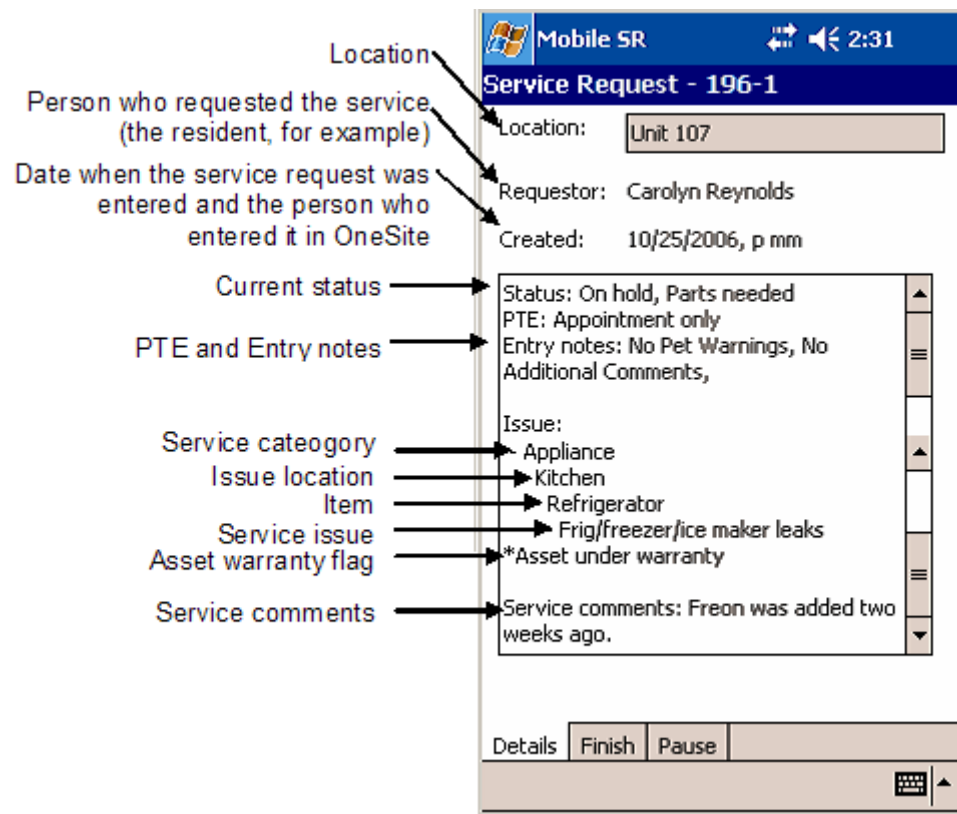
If you are a manager or a lead, you also have the **Advanced find** option to search by **Technician** or to search for those requests assigned to you.

---

- Once you have selected the value you want to filter by, tap **Find**. The **Service requests** window shows only those requests that match your criteria.

## The Service Request Details

The service request details view provides the following information about the service request. This information is shown for regular, recurring, and make ready service requests. Some of the information provided will vary depending on the type of service request you are viewing. For example, the asset warranty flag only appears if the request is for an asset that is currently under warranty.

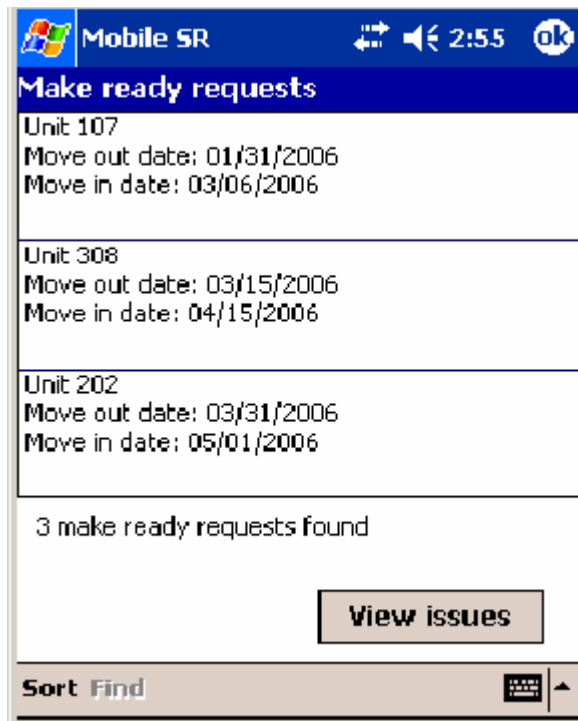


- **Location:** This will be the common area, the unit, or the building-unit (if your property uses buildings).
- **Requester:** This is the name of the person requesting the service, typically the resident.
- **Created (date):** This is the date on which the service request was entered into Mobile Service Requests or OneSite Facilities.
- **Created (user name):** This is the OneSite user name of the person who entered the request.
- **Status:** This is the current status of the request. If the status is On hold and an on-hold reason was selected, that reason is shown immediately after the status.

- **PTE:** This is the permission to enter terms for the unit.
- **Entry notes:** If there are any additional entry notes for the unit, they are shown here.
- **Issue:** Here the category, location, item, and service issue are given for the request.
- **(Warranty):** If the issue is for an asset that is under warranty, the "Asset under warranty" message displays here.
- **Service comments:** Any service comments entered for the service request appear.

## Make Ready Requests

The **My make ready requests** button opens a window listing all make ready requests that include at least one service request that is currently assigned to you. Make ready requests are downloaded to the Pocket PC if they are In progress and have at least one service request that has not been completed.



The **Make ready requests** window displays the following make ready request details:

- The unit that needs to be made ready
- The prior or current resident's scheduled move-out date
- The new resident's scheduled move-in date (if there is one)
- The total number of make ready requests with issues assigned to you

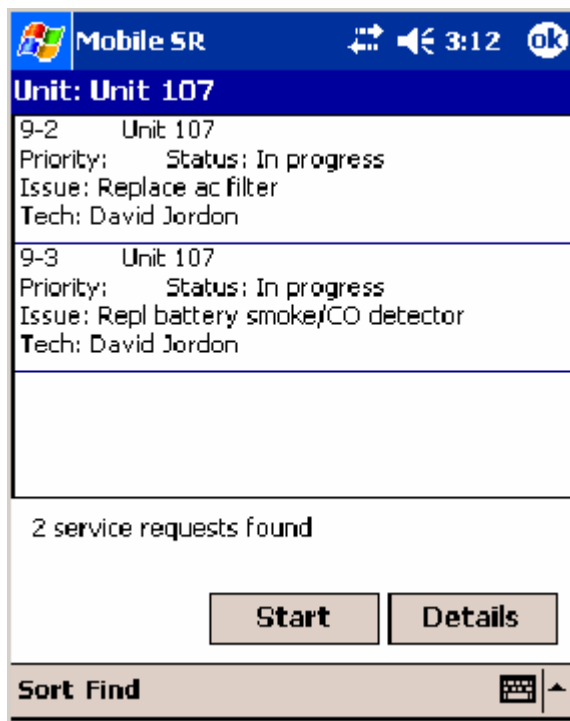
## Sorting Make Ready Requests

Before you start working on a make ready request, you might want to search them to see which ones are the highest priorities. The **Sort** option displays all make ready requests, listed in order by a value you select.

1. Tap the word **Sort** at the bottom of the **Service requests** window. A new window opens displaying the types of information you can sort by, with a check mark beside the value they are sorted by currently. You have the option to sort by location, move-out date, and move-in date.
2. Tap the option that you want to use to sort the list.
3. The list redisplay, sorted in ascending order by that type of information.

## Viewing Make Ready Issues

1. To view the specific issues within a make ready request, tap the make ready request and then tap the **View issues** button.



2. The make ready issues window shows you the outstanding service issues in this make ready request that are assigned to you. These service requests also appear in the **My service requests** list, and you can work with them from either place. (See **The Service Requests List** (on page 22) for more information.)
  - **Sort** the list by Priority, Status, or Service request number. (They are always for the same location.)
  - **Details** displays the service request details window
  - **Start** working on the issue

The advantage of the **Make ready requests** list is that it shows only those service requests that need to be completed in order to close the make ready.

---

If you are a manager or a lead, you can also sort the make ready issues by technician and find all, unassigned, or your own issues. You will also have the **Assign** button, allowing you to assign one or more of the requests to a technician.

---

## Clocking Out for the Day

When you have completed all your service requests and facilities maintenance activity, tap the **Clock out** button on the Mobile Service Requests main page. Tapping this button logs the time on the Pocket PC and sends it to the database for your timesheets.

---

**REMINDER:** You can only clock in and clock out once per day.

---

## About Status Color Codes

Each service request is color-coded so that you can quickly tell its status. The colors and the statuses are given below:

Background Color	Service Request Status
White	In progress
Yellow	On hold
Red	Canceled
Green	Complete

# Working with Make Ready and Service Requests

- If you want to work with service requests, use either the **My service requests** button or the **Service requests** button to open the **Service requests** list window. There, use the **Sort** or **Find** option to locate the service request you want to work with. Once you've found the service request you want to work on, you can review the **Details** or **Start** work on the issue.
- If you want to work with make ready requests, use either the **My make ready requests** button or the **Make ready requests** button to open the **Make ready requests** list window. There, use the **Sort** or **Find** option to locate the make ready you want to work with. Once you've found the make ready request you want to work on, tap the make ready request in the list and then tap the **View issues** button. The system displays a list of the service request issues that are associated with the make ready request. Here you can review the **Details** or **Start** work on the issue.

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Definitions of Statuses.....	33
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## Starting the Service Request

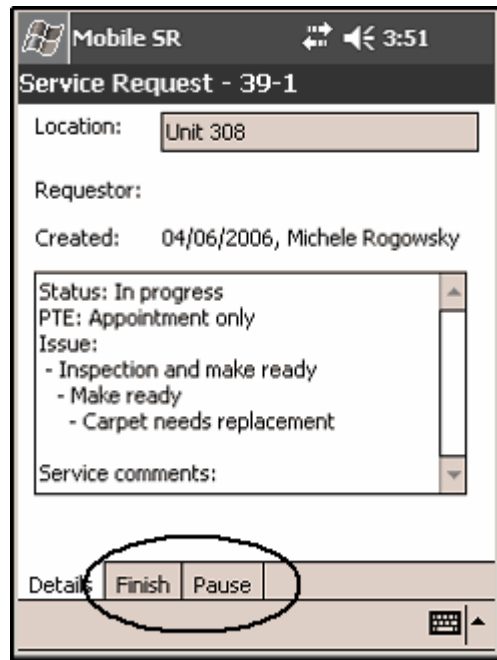
1. To start working on a service request, tap the issue in the **My service requests** list, and then tap **Start**.

---

Managers and leads are able to see all service requests, not just those assigned to them. If you are a manager or a lead and select a service request that is not assigned to anyone or is assigned to someone else, the system asks you if you want to assign it to yourself automatically. If you say **Yes**, the request assignment is updated with your name when you save the request. If you say **No**, you can still record a service action for the request without changing the assignment. This allows you to change the status of the service request, for example, without changing the assignment.

---

2. The service request's details window opens, and Mobile Service Requests logs the current time as the time you started working on the service request.



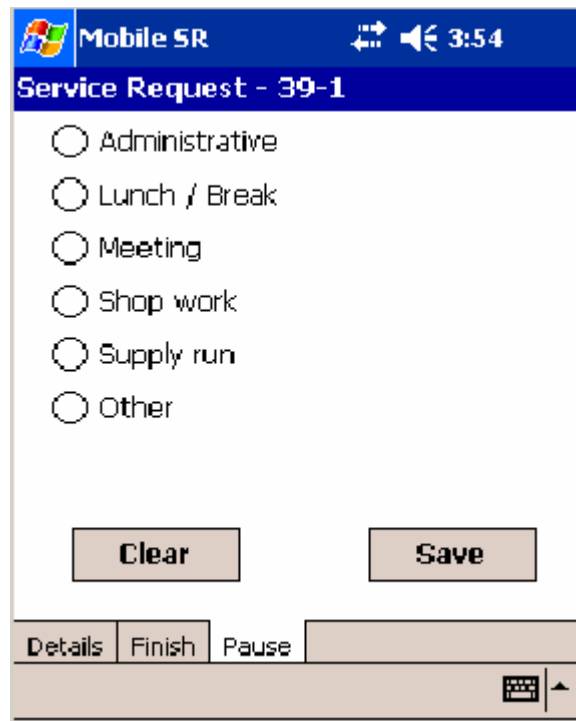
3. Review the service request.

## Pausing a Service Request

Pausing a service request is different than putting one on hold. Use “hold” when something related to the service request has caused you to suspend work on it (such as having to order a part). Use pause when something outside the project has caused you to suspend work on it (such as having to attend a meeting or take a lunch break).

### To Pause a Service Request:

1. Tap **Pause** at the bottom of the service request window. The **Pause** window opens.



2. Select a reason for the pause.
3. Tap **Save** to return to the **Service requests** list. (To return to the service request details without saving the pause, simply tap the **Details** or **Finish** tab.)
4. The pause will end as soon as you start another service request or clock out for the day.

### Restarting a Service Request

You can start a service request more than once. For example, you may have given a service request the status of “on hold” until a part had been delivered. Or you may have paused a service request to go to lunch or attend a meeting.

To restart a request, follow these steps:

1. View the **My service requests** list.
2. Find the request you wish to restart. Remember, service requests that you put on hold will have a yellow background.
3. Tap the service request and then tap the **Start** button.

---

You cannot restart a service request that has been given a status of Canceled or Complete.

---

## Finishing a Service Request

Use the **Finish** tab whenever you have to stop working on a service request. This may be when you have completed your work and resolved the issue. Or you may have completed a particular task, but will have to perform additional work to fully resolve the issue.

Use the **Finish** tab to record that you have stopped working on a service request and to indicate why.

1. Tap **Finish**. The finish service request tab looks a little different for a make ready service request and a regular or recurring service request, as shown below. The only difference is the kind of comments you can enter and the way you enter comments.

Regular or Recurring Service Request

Make Ready Service Request

2. Select the service action you performed.
3. Tap **Bill resident** if the resident is responsible for damages.
4. Select the appropriate status from the **Status** drop-down menu. You can finish a service request by giving it a status of In progress, On hold, Canceled, or Complete.
5. If you want to enter a comment:
  - For a regular service request, choose and/or type in a reason that explains the status of the service request in the **Time worked comments** field. (See **Time Worked Comments to a Regular or Recurring Service Request** (on page 35) for detailed information.)

- For a make ready service request, enter your comments in the **Service comments** field. (See **Adding Service Comments to a Make Ready Service Request** (on page 37) for detailed information.)
6. Click **Save**. If you have given the issue a status of Canceled or Complete, it will be removed from the list of service requests the next time you synchronize. Until then, it will remain in the list of requests but cannot be updated. Canceled requests are red in the list, and Complete requests are green.

### Canceling a Service Request

To cancel a service request, you simply change the status to Canceled. However, you cannot cancel a service request if any time has been recorded for the issue or any "parts used" have been recorded for the issue.

## Definitions of Statuses

Use the definitions below to decide which status you should assign to service requests:

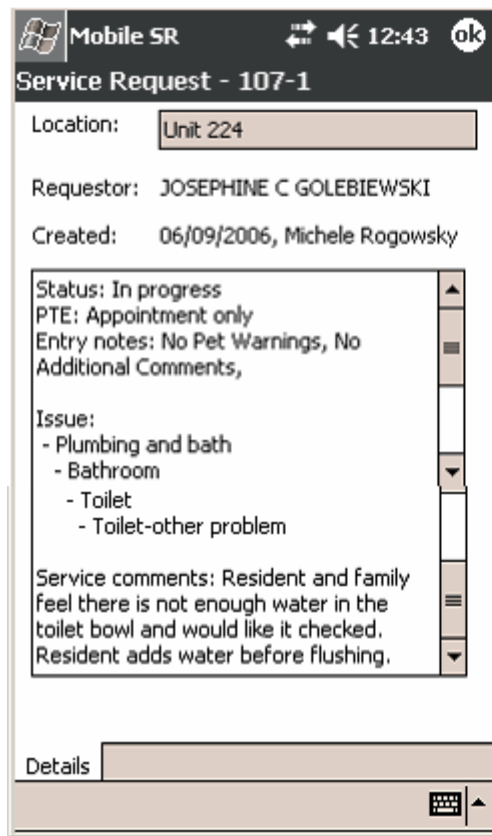
- **In progress:** You are currently working on the service request. This is the default status for an issue.
- **On hold:** You started the request and will return to it later (for example, once a part is delivered). For now, you can not do more work on the request.
- **Canceled:** You cannot complete the project.
- **Completed:** You completed the service request.

## Comments

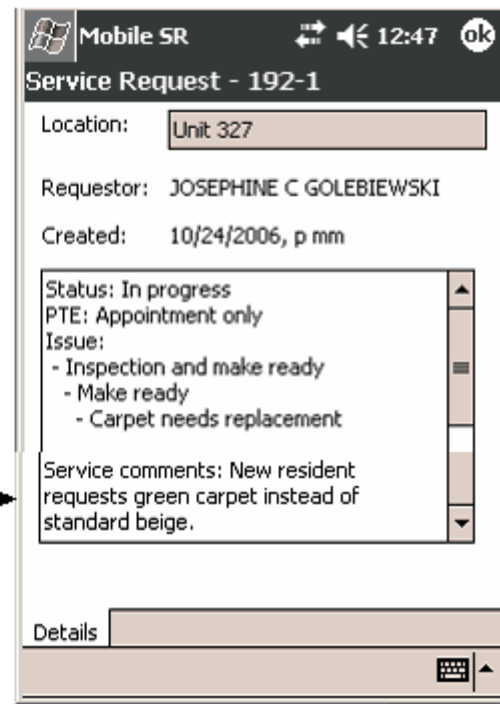
OneSite Facilities and Mobile Service Requests allow you to review and enter comments for any service request, providing more information on the nature of the issue, the status of the request, or the service action that was performed.

On the Pocket PC, you will see any comments related to the service issue in the service request details. These **Service comments** are the same for all types of service requests: regular, recurring, and make ready.

**Service Comments** entered for a regular or recurring service request.



**Service Comments** entered for a make ready service request.



As technicians work on individual issues, you will have the opportunity to enter additional comments each time a service action is recorded. For example, you might add one comment when you put a service request on hold, and add a second comment when you complete the request. Or, you might select more than one comment to explain the status you gave a request.

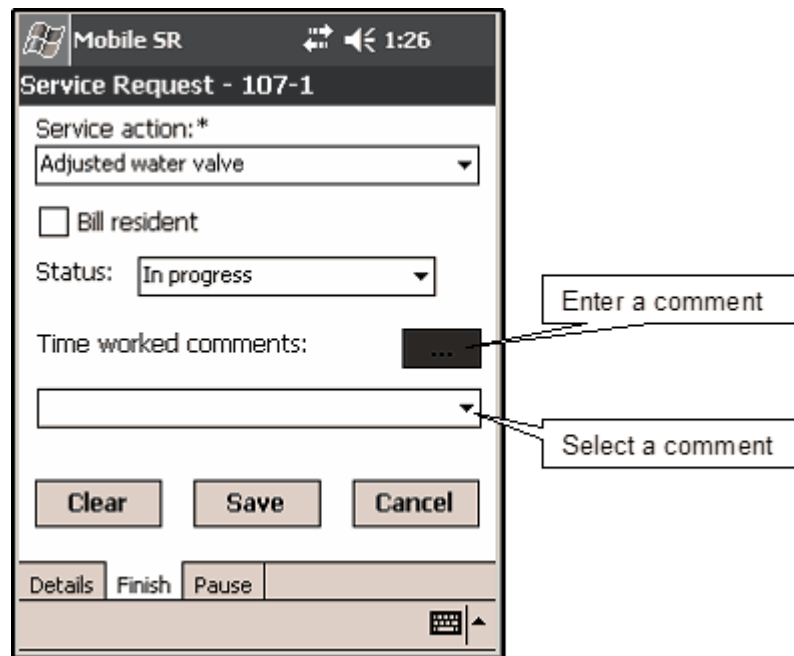
Comments are cumulative. That is, when you add a comment, you can see all of the **Service comments** and **Time worked** comments added previously for the issue and any previous actions taken. However, the way comments are recorded is slightly different for regular and recurring service requests and for make ready service requests.

## Adding Time Worked Comments to a Regular or Recurring Service Request

Each time you enter a service action for a service request, you can add a comment to provide additional information. Perform these steps to add a comment while updating a service request.

1. Locate the service request you want to work with in the **Service requests** list.
2. Tap the service request and then tap **Start**.
3. Tap the **Finish** tab and complete the service action entry:
  - Select the **Service action**.
  - Indicate whether this service is billable back to the resident.
  - Select the **Status**, if you are changing the status of the request.
4. Note that the service comments are not shown here. (To see the service comments, tap the **Details** tab.) Instead, you can add **Time worked comments** for the service action.

There are two ways to add a time worked comment, depending on the type of comment you need to enter. You can select a pre-written comment from a list or you can use the keyboard to tap in a comment.



### Selecting a Comment

1. Tap the drop-down arrow in the comments field and select a pre-formatted comment. You can select more than one comment, if appropriate.

2. The comments are added to the **Comments** window. To view the comments, tap the **Ellipsis** button .
3. To clear the comments, tap the **Clear** button at the service action window.


---

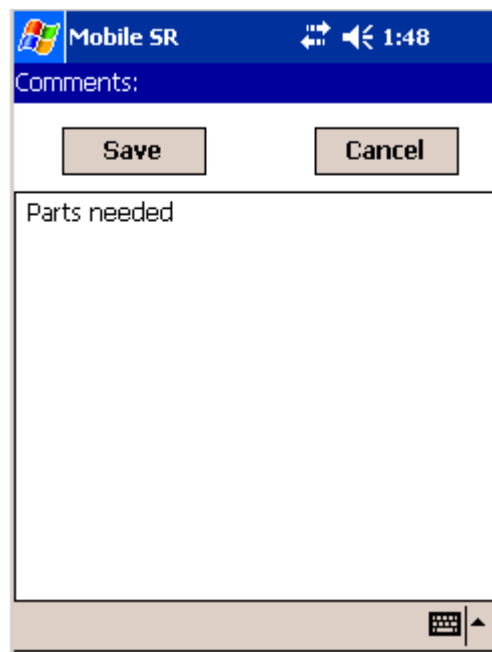
The **Clear** button deletes ALL comments and information, not just the last comment entered.

---

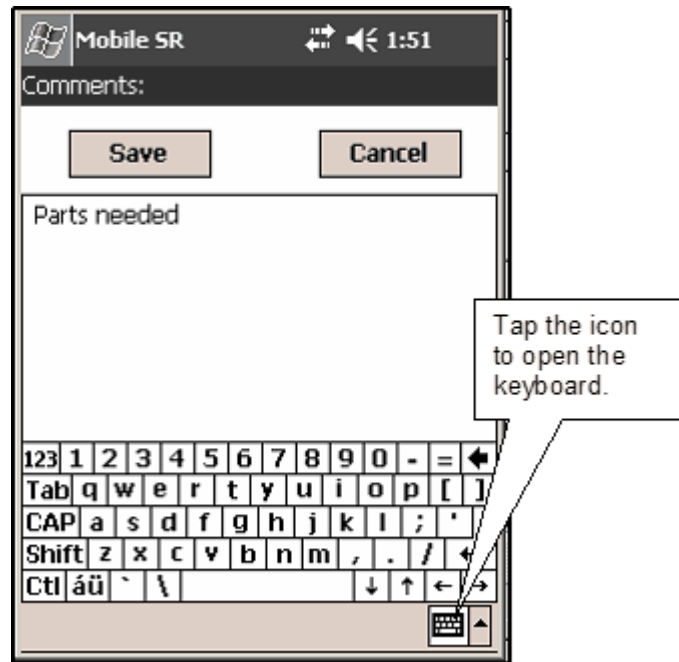
4. Tap **Save** to add the service action. Note that comments are not added (or cleared) until you save the service action. To exit without saving the service action, tap **Cancel**.

### Entering a Comment

1. Tap the **Ellipsis** button  to open the **Comments** window. (If the button is green, it indicates that comments have been recorded.) The **Comments** window shows you any time worked comments that have been previously entered for this service request (both selected and entered).



- To add a comment, tap the keyboard icon in the lower-right corner.



- With the keyboard open, tap in the comments area. Use your stylus to tap in the comment you want to add. You can add, edit, or delete any comments, as needed.
- When finished, tap **Save** to return to the service action details.
- To clear the comments, tap the **Clear** button.

---

The **Clear** button deletes ALL comments and information, not just the last comment entered.

---

- Tap **Save** to save the service action, with the new comment added. Note that comments are not added until you save the service action. To exit without saving the service action, tap **Cancel**.

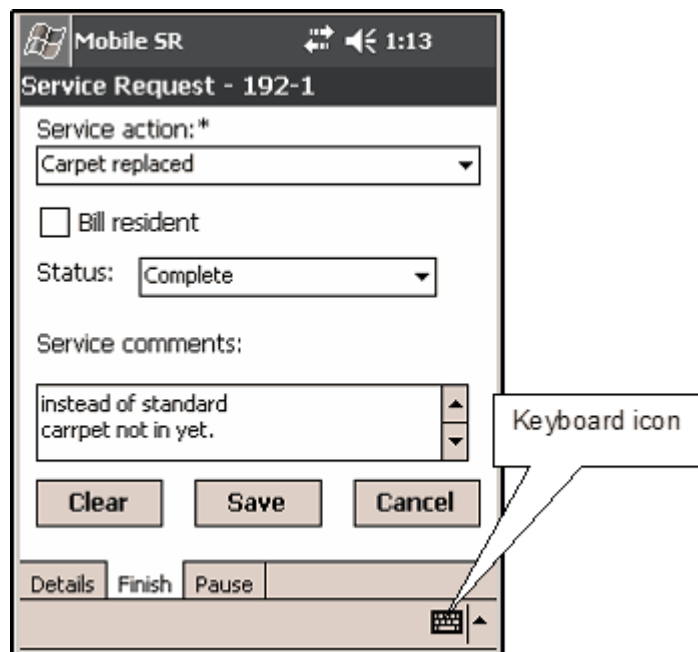
## Adding Service Comments to a Make Ready Service Request

Each time you enter a service action for a make ready service request, you can add a comment to provide additional information. The service comments that you add here display on the Facilities **Make ready board** when you sync your Pocket PC to OneSite and update this service request.

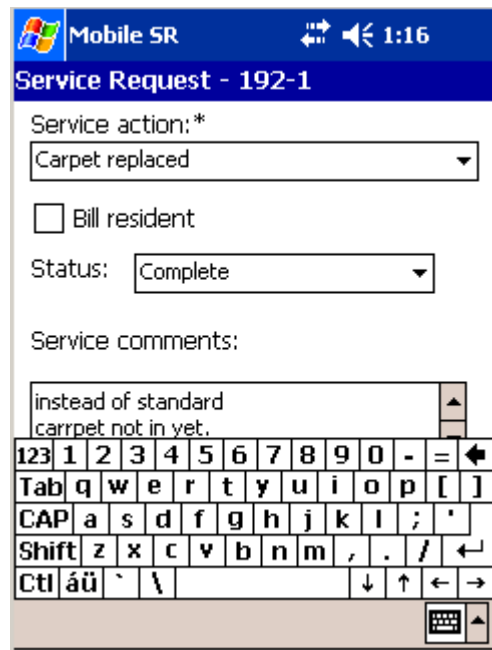
Perform these steps to add a comment while adding a service action.

- Locate the make ready service request you want to work with in the **Service requests** list or the **Make ready requests** list.
- Depending on which list you are working from, perform one of the following:
  - From the **Service requests** list, tap the make ready service request and then tap **Start**.

- From the **Make ready requests** list, select the unit you want to work with and tap the **View issues** button. Then select the make ready service request and tap **Start**.
3. Tap the **Finish** tab and complete the service action entry:
    - Select the **Service action**.
    - Indicate whether this service is billable back to the resident.
    - Select the **Status**, if you are changing the status of the request.
  4. Note that previous service comments are fully visible to you, so you can easily see the status and the history of this issue. To add a comment, tap the keyboard icon in the lower-right corner.



5. With the keyboard open, use your stylus to tap in the comment you want to add. You can also change or delete the comments that are already there.



6. When finished, tap the keyboard icon again to hide the keyboard.
7. To clear the comments, tap the **Clear** button.

---

The **Clear** button deletes ALL comments and information, not just the last comment entered.

---

8. Tap **Save** to save the service action, with the new comment added. Note that comments are not added until you save the service action.



# Service Request Management

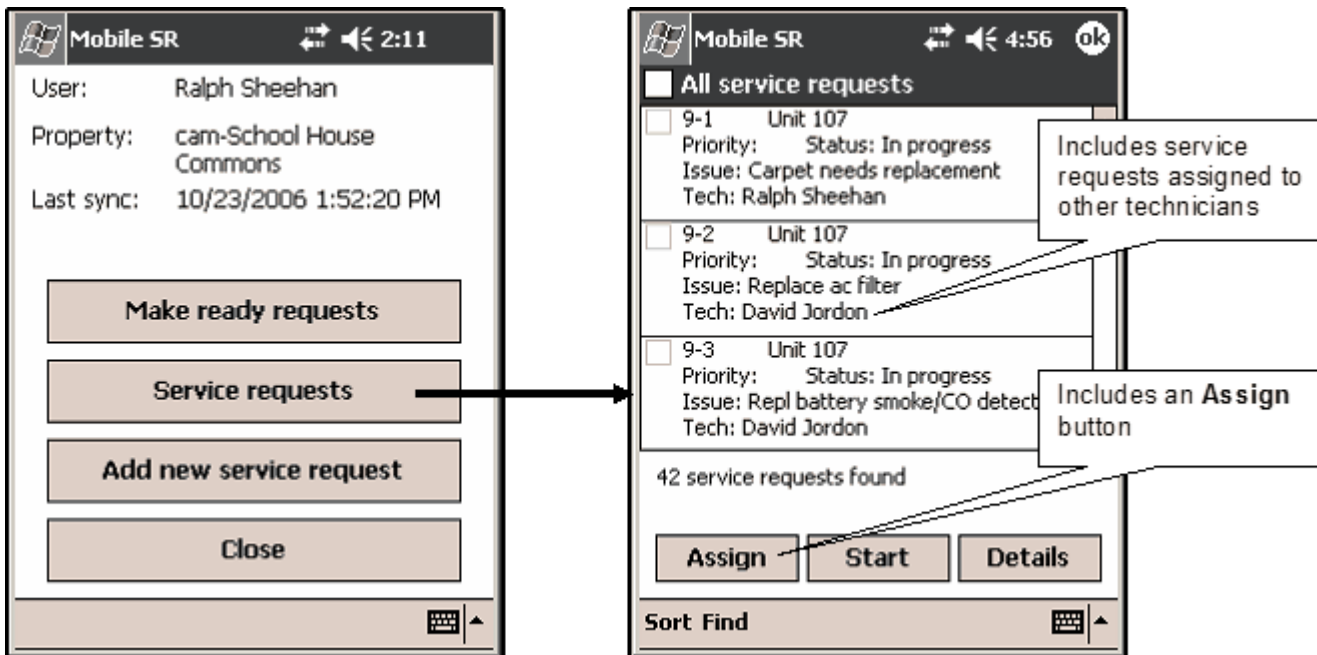
In addition to the ability that technicians have to view and edit their own service requests, service leads and service managers can also assign and add service requests. This chapter details those tasks that only people with the Property Maintenance Lead or Property Maintenance Manager role can perform.

## In This Chapter

Viewing All Service Requests .....	41
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## Viewing All Service Requests

When a service lead or manager taps the **Service requests** button at the Mobile Service Requests menu, the **All service requests** list displays. This list is the same as the list shown to individual technicians, except that it includes all open service requests, not just those assigned to the person who is signed on. This includes service requests that are open and assigned, open and unassigned, and on hold.

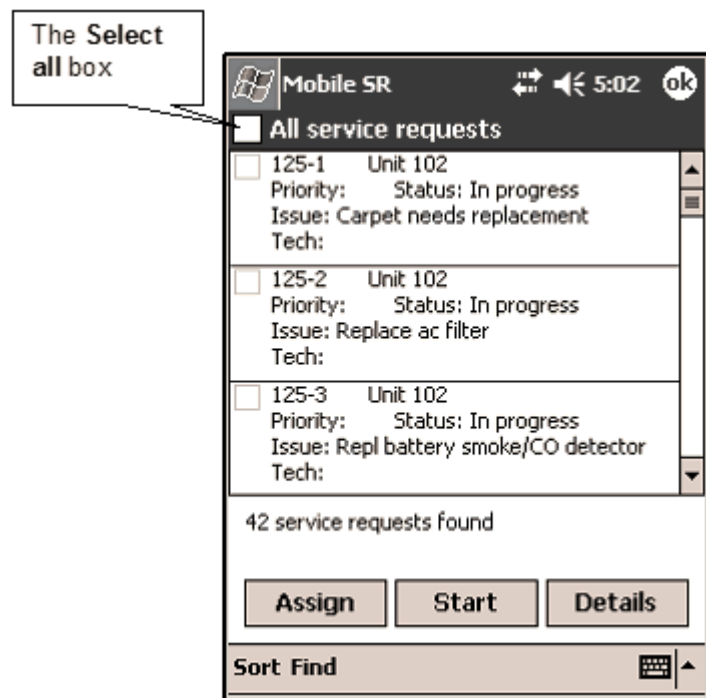


Requests can be sorted and searched as described in **Sorting and Finding Service Requests** (on page 23).

## Assigning Service Requests

Only service leads and managers can assign service requests to individual technicians. The same procedure may be used to reassign any requests that have not been canceled or completed yet.

1. Tap **Menu**.
2. Tap **Service requests**.
3. All In progress or On hold service requests for the property display.
4. Use the **Sort** or **Find** options to locate the request (or requests) that you want to assign.



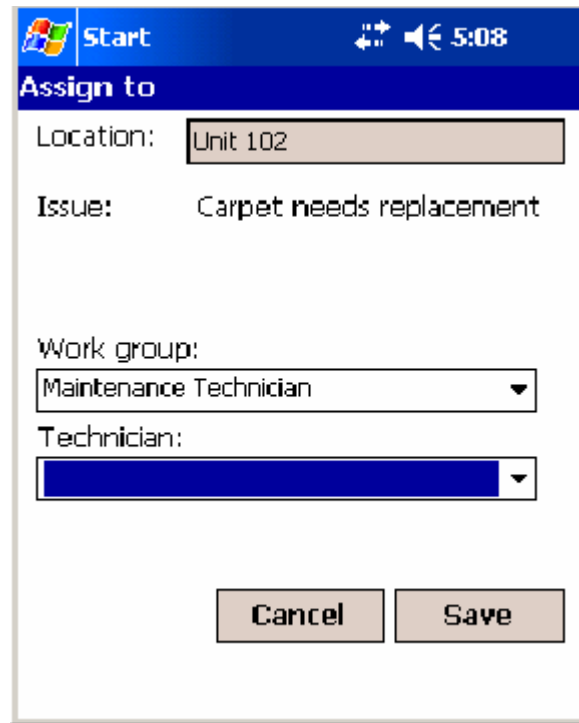
5. To select a single request, tap the request to be assigned. The request is selected.
6. To select multiple requests, tap the **Select all** box. All requests are selected. You can then tap individual requests to deselect them.

---

To locate all unassigned service requests quickly, tap **Sort** and then select **Technician**. All service issues that have no technician assigned are sorted to the top of the list.

---

7. Tap **Assign**. The **Assign to** window opens.



The screenshot shows a mobile application window titled "Assign to". The window has a blue header with the Windows logo and the text "Start". Below the header, there are several fields: "Location:" with a text box containing "Unit 102"; "Issue:" with the text "Carpet needs replacement"; "Work group:" with a dropdown menu showing "Maintenance Technician"; and "Technician:" with a dropdown menu that is currently empty. At the bottom of the window are two buttons: "Cancel" and "Save".

---

You cannot assign a service request or make ready request to a technician if the request is Complete or Canceled.

---

8. Select the work group to be assigned to the service request(s).
9. Select the technician to be assigned to the service request(s).
10. Tap **Save**. If you make an error at any time, you can tap **Cancel**.

---

You can use this same procedure to assign technicians to make ready service requests by tapping the **View issues** button at the **Make ready requests** list and then assigning one or more of the service requests.

---

## Adding a New Service Request

1. From the **Menu** window, tap **Add new service request**. The **Add service request: Step 1 of 3** window opens.

2. Select a location type: single unit, common area, or building.
3. The page displays option lists based on the location type you chose. Use these lists to further identify the service request location:
  - If you selected **Unit** as the location type, you next select a building, unit number, and permission status.
  - If you selected **Common area** as the location type, you next select the name of the area.
  - If you selected **Building** as the location type, you next select the name of the building.

---

Building selection only appears if your property has buildings set up. Otherwise, the options are only unit and common area, as shown.

---

4. Click **Next**. The **Add service request: Step 2 of 3** window opens.


**Add service request: Step 2 of 3**

Category: \*  
Electrical and lighting

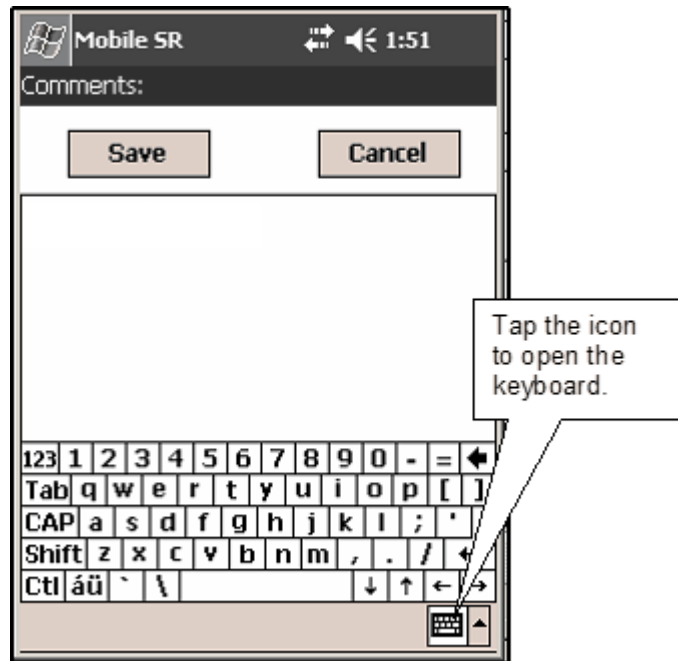
Location:

Item: \*  
Interior lighting

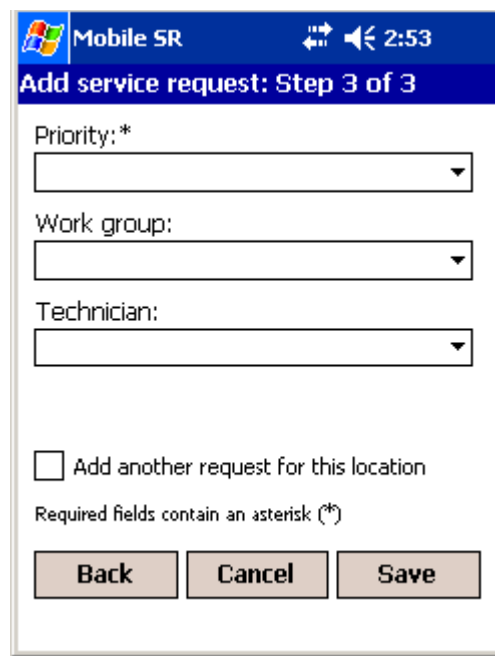
Issue: \*  
Light flickers  
Interior light-other problem  
Light bulb is out  
Light cover problems  
Light does not work properly  
Light flickers  
Other - Please see comments

5. Select a category for the issue.
6. Select a location for the issue, if appropriate.
7. Select the item the issue pertains to. The list of items you have to choose from will depend on the category of the issue.
8. Select an issue. The list of issues you have to choose from will depend on the item you chose.
9. To add service comments, tap the **Ellipsis** button . The **Comments** window opens.

10. To add a comment, tap the keyboard icon in the lower-right corner.



11. With the keyboard open, tap in the comments area. Use your stylus to tap in the comment you want to add. You can add, edit, or delete any comments, as needed.
12. Tap **Save** to save your comments and return to the **Add service request** window. To exit without saving your comments, tap **Cancel**.
13. Click **Next**. The **Add service request: Step 3 of 3** window opens.

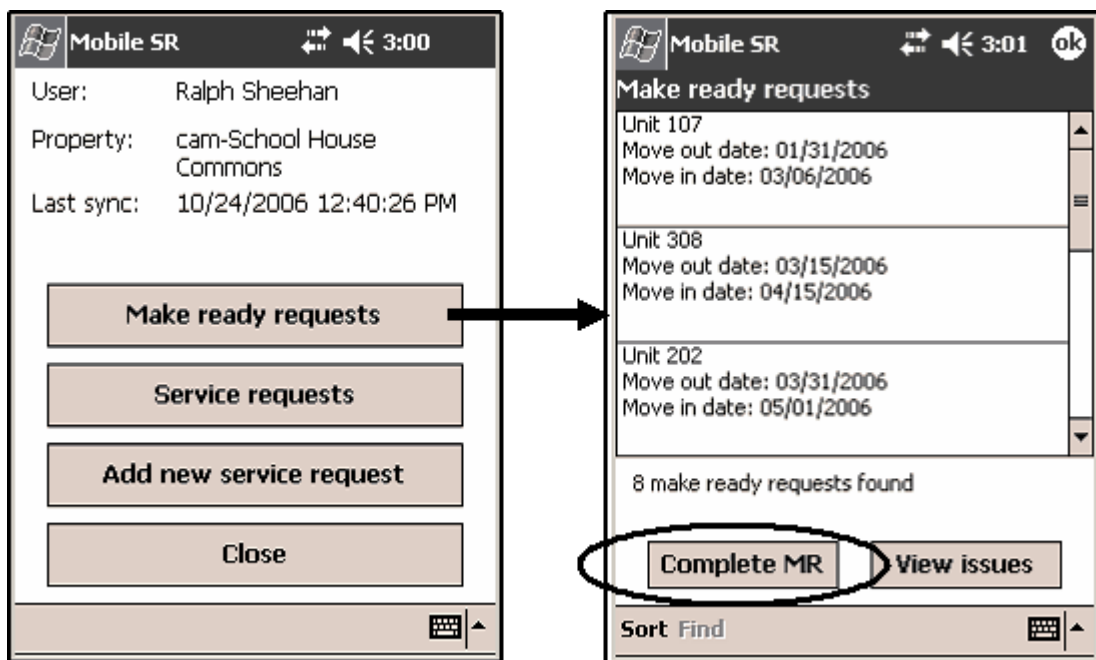


14. Assign the issue a priority, select a work group, and select a technician. The list of technicians to choose from will vary depending on the work group you chose.
15. If you want to add a related issue to this request, tap the **Add another request for this location** option. The system takes you back to the **Step 1 of 3** window, with the location already selected. Complete the remaining steps for each additional issue you need to add to this service request.
16. Click **Save**. The issue is now added to the list of all open service requests.

## Completing a Make Ready Request

If you are a manager or a lead, you have the ability to mark a make ready request as complete. Technicians can work with and complete individual service issues in the make ready, but they cannot mark the make ready itself as complete.

1. To complete a make ready, tap the **Make ready requests** button at the menu.
2. The **Make ready requests** list opens, showing all make ready requests.
3. Use one of the **Sort** options to locate the make ready request you want to complete. (See **Sorting Make Ready Requests** for more information.)



4. Tap the **Complete MR** button.
5. The system displays a message asking you to confirm that you want to complete the make ready:
  - **OK:** Tap this button to complete the make ready and all of the In progress and On hold service requests associated with the make ready. (Canceled service requests remain canceled.)
  - **Cancel:** Tap this button to cancel and return to the make ready list.

6. When you complete a make ready, it remains in the **Make ready requests** list until you sync the Pocket PC. Completed make ready requests are shown as green to identify them easily.



