MRI Workspeed

Tenant's Guide to Workspeed

April 2017

Every released version of MRI products gets its own release notes. However, guides are only updated when changes have been made to product features that require changes to documentation. If there is no guide specific to your version, use the most recent corresponding document (which may refer to an earlier version of the software).

Table of Contents

Welcome to Workspeed

Congratulations! You now have the ability to quickly and easily initiate and track all your service and maintenance requests via your web browser.

Workspeed increases Property Management efficiency and provides tenants with faster request fulfillment. Workspeed also offers accurate request tracking and reporting capabilities for accessing historical and billing information on completed requests.

Your Property's Workspeed Login Page

Some properties have a custom login page. If your property has a custom login page, it may be listed here. If you have questions regarding your login page, contact your property manager.

http://_____.workspeed.com

Accessing Workspeed

Workspeed System Requirements

To see Workspeed system requirements, visit the [Technical Requirements](#) page in the Workspeed product.

Signing In to the Workspeed System

Follow the steps below to sign in to Workspeed:

1. Launch your browser.

2. Access the **Workspeed Login** page using one of the following 3 methods:

   - Enter your property's Workspeed web address that you received in the Welcome to Workspeed email with your user name and password.

   - Type https://secure.workspeed.com in your browser address bar.

   - Click the link in your Welcome To Workspeed email.
     Enter your user name and password in the **Sign On** section.

3. Click **SIGN IN** or press the **Enter** key. This will take you to the **Workspeed Home** page (Figure 1).

Figure 1. The Workspeed Home Page

Using Workspeed

Creating a Service Request

1. From the **Main Menu Bar**, select **SERVICE REQUEST > CREATE SR** to go to the **Select Type** step (Figure 2).

Figure 2. The Service Request Tab and Select Type Step

2. Select a service request category.

3. Select the service request type that best fits your need. This takes you to the **Enter Info** step.

4. Enter a brief description of the work requested in the **Brief Description** field.

5. If your company has divisions, select the appropriate division from the **Divisions** drop-down menu *(optional)*. If you choose a division, the appropriate value for the **Cost Centers** field will automatically populate.

6. The location will default to you or your company's location. You can adjust this location as needed by selecting from the available options in the various drop-down menus.

7. Enter additional details about the location in the **Location Details** field and a contact name in the **Upon Arrival Ask For** field *(optional)*.

8. Provide supporting documentation by clicking the **Add More Documents** link in the **Related Documents** section *(optional)*.

9. Click **CONTINUE** to confirm the information.

10. Review the request information then select one of the following:

    - Click **SUBMIT** to submit the request. When the request is submitted, you will see a "Please Wait" message blinking in the **Status** area while the request is generated. You will then receive a message that says "New – Confirmed ID #." This is the Service Request Identification number (SR ID#) you can use to find requests and to check the status of a request. For more information on this, see Finding Requests and Checking Status.

- Click the **Edit Section** link to return to the **Create Service Request** page so you can edit the request details.

- Click **CANCEL REQUEST** to cancel the request and return to the **Select Type** page.

Creating Shared Resource Requests

Workspeed lets you make reservation requests for shared resources, such as freight elevators and conference centers. To create a shared resource request, follow these steps:

1. Select a resource from the **Amenities** drop-down menu. This will take you to the **Schedule Shared Resource** page.
   or
   On the **Create SR** tab, click the **SERVICE REQUEST** menu.

   a. Select **Shared Resources** as the service request type.

   b. Choose a resource. This will take you to the **Enter Info** page for the Schedule Shared Resource process.

2. If your company has divisions, select the appropriate division from the **Divisions** drop-down menu *(optional)*. If you choose a Division, the appropriate value for the **Cost Centers** field will automatically populate.

3. Choose which resource you would like to reserve from the **Select Shared resource** drop-down list.

4. Enter a description in the **Reason for Reservation** field.

5. Place your cursor in the **Date of First Reservation** field and use the calendar to select a date, or enter the date as **MM/DD/YYYY**.

6. Click **SUBMIT** to go to the **Shared Resource Calendar** page (Figure 3).

Figure 3. The Shared Resource Calendar Page

7. Select the boxes that correspond to the dates and times you want to reserve and click **Submit** to see the **Confirm** page.

8. Review the scheduling information.

9. Click **Edit** to change any of the information, if necessary.

10. Click **Confirm** to finalize the reservation.

Finding Requests and Checking Status

Workspeed allows you to view any service request in the system so you can see details of the request or modify the request, if necessary.

Note

You cannot modify a request after the status has been changed to Complete, but you can add a comment at any time.

You can find request records using one of these three methods:

Viewing All Requests

1. Click **SERVICE REQUEST > ALL REQUESTS** to go to the **All Requests** page (Figure 4).

Figure 4. The All Requests Page

2. Use the **Requests by** drop-down menu to select how service requests will be displayed:

   - Type—Requests will be displayed by type of request.

   - Tenant—Requests to which you have access will be displayed by the name of the tenant who submitted the request.

   - Action Required—Requests will be sorted by the next action that is required for each request.

- Status—Requests will be sorted by their status in the completion process.

- None—All requests will be displayed, sorted by creation date by default.

3. Click the category link that matches the request you are trying to find.

4. Click the **ID#** link to view the service request.

Viewing My Requests

While the **All Requests** page shows all service requests company-wide, the **My Requests** page shows only the requests generated by the logged in user. To view My Requests, follow these steps.

1. Click **SERVICE REQUESTS > MY REQUESTS** to go to the **My Requests** page. Use the **Requests by** drop-down menu to select how service requests will be displayed:

   - Type—Requests will be displayed by type of request.

   - Status—Requests will be sorted by their status in the completion process.

2. Click the category link that matches the request you are trying to find.

3. Click the **ID#** link to view the service request.

Searching for Service Requests

1. Click **Search** in the **Workspeed Tools** bar on any page to go to the **Search** page (Figure 5).

Figure 5. The Search Page

2. Select the check box next to the criterion you want to use. For some criteria, the **Search** page will expand and you can enter specific information.

3. Click **Submit**.
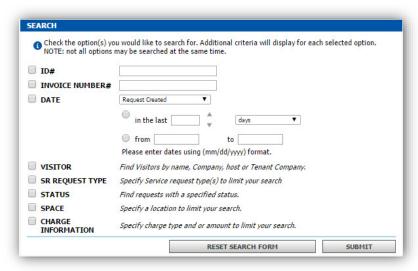
4. Click the **ID#** link to view the service request.

Completing My To Dos

Some service requests may require further action on your part to be completed. These requests can be found in the **My To Do's** section. Failure to address requests in this section will prevent them from progressing to the next step.

1. Click **HOME > MY TO DO'S** to go to the **My To Do's** page.

2. Select the link for the action you want to perform, such as **Update Request Information**, **Sign Off**, or **Authorize Request**.

3. From the list of service requests in the selected category, click the **SR ID#** of the request you wish to update.

4. Review the service request comments for information.

5. Click the **Edit Section** link to modify the original details of your request as needed.

Generating Reports

Workspeed provides several standard reports for viewing service request activity and billable backup information. These reports are updated periodically as progress information for each request is added to the system. To view reports, follow these steps:

1. Click **REPORTS > GENERATE REPORTS** from the **Main Menu Bar** to see the **Reports** page.

2. Click a report category from the **Report List** to view the report list in each category.

3. Select a report name from the list of available reports.

4. Select the desired report options (Figure 6), which will differ from report to report.

Figure 6. Report Options

5. Click **GENERATE REPORT** to create the report.

6. Click **VIEW** to review the report.
   or
   Click **REGENERATE REPORT** to recreate the report, which you might do if the report was generated previously and you want to include more current information.

By default, reports in Workspeed are generated as PDF files that can be viewed, saved, and printed directly from the Adobe Acrobat Reader software, which is available as a free download from www.adobe.com.

All reports in Workspeed can also be created as Excel spreadsheets or in the Comma Separated Variable (CSV) format for further processing.

Adding Visitors

If your property uses Workspeed's Visitor Security, you can preregister expected visitors with the security desk in the lobby by following these steps:

1. Click **SECURITY > CREATE VISITOR REQUEST** to view the **Create Visitor Request** page (Figure 7).
   or
   Click SERVICE REQUEST > CREATE SR, select the **Security** category, and select **Visitor** to view the **Create Visitor Request** page (Figure 7).

Figure 7. the Create Visitor Request Page

2. Enter information about the visitor manually or upload the visitor list by uploading a populated CSV file using the **Choose File** and **Upload** buttons. A sample file can be downloaded by clicking the **Download Sample File** hyperlink. Required fields are marked with a blue asterisk.

3. The **Visiting** field will default to you. You can modify who they are visiting by selecting from the available options in the drop-down menu.

4. The **When** field will default to today. If you wish to modify the date, you can click into it and choose a date using the calendar. Similarly, you can choose a time from the **At:** drop-down.

5. The **Where** building, block, floor, and suite, and space options will automatically populate with your default location. You can adjust this location as needed by selecting from the available options in the various drop-down menus.

6. If you select **Check this box to schedule repeated visits**, the section will automatically expand with more fields. Complete these fields to schedule multiple visits.

7. Populate the **Visitor Information** grid with your visitor's first name and last name. Email and company are optional. If you have more than five visitors, you can click **Add Visitors** to increase the grid size.

8. Provide any supporting documentation by clicking the **Add More Documents** link in the **Related Documents** section (*optional*).

9. Click **CONTINUE** to view the **Confirm Visitor Request** page.

10. Review the information. If it is correct, click **SUBMIT** and wait for the confirmation number.

You will be notified via email when the visitor checks into the lobby.

Updating Visitor Requests

To view or update your visitor requests, follow these steps:

1. Click **SECURITY > MY VISITORS** to see the list of visitors you have entered (**Error! Reference source not found.**).
or
Click **SERVICE REQUEST > MY REQUESTS** and select the **Visitor** link to see the list of visitors you have entered.

2. By default, today's visitors are displayed. Use the drop-down menu to select other days to view. Click the hyperlinked name of a visitor to view details about the visitor and the scheduled visit on the **View Visitor Request Information** page (Figure 8).

Figure 8. The View Visitor Request Information Page

3. To change the details, click one or more of these buttons:

   ▪ BACK—Select a different visitor request

   ▪ CANCEL REQUEST—Remove the request from the queue

   ▪ ADD COMMENTS—Append descriptive text to the request

- MODIFY—Edit the details of the request

4. Make whatever changes are needed to the visitor request and click **CONTINUE**.

5. Review the information and click **SUBMIT**.

Note

Modification options are only available before the visitor checks in.

Managing Workspeed Information

Updating My Profile

The **My Workspeed** page contains various sections that let you do the following:

- Maintain your contact information
- Configure your sign-in preferences
- Manage system shortcuts
- Select notification preferences
- Maintain user groups
- Specify an emergency action plan (EAP).

To update your profile, click **My Workspeed** in the **Workspeed Tools** bar on any page to go to the **My Workspeed** page.

Complete or update the information in these sections:

Contact Information

- Update your contact information by making edits in any of the information fields in the **Contact Information** section.
- Update your username or password by clicking **Change Username/Password** and following the provided instructions.

Sign In Preferences

- Select a default home page by selecting a page from the drop-down menu.
- Select or clear the **Show Workspeed Bar Messages** check box to determine whether **Workspeed Bar** messages will be visible.

My EAP

The **My EAP** page will only be available if property management has elected to create an emergency action plan. If the page is available, you can access this page to view and edit EAP information.

1. Select the property for which you play a role in the EAP in the **Property Name** field.
2. Select the role that best fits your responsibilities in the **EAP Role** field.

3. Enter relevant data in the **Special Needs Info** and **Critical Operation Info** fields.

4. Use the **Building/Block**, **Floor**, and **Suite** fields to specify your assignment location.

5. Enter the Certificate of Fitness numbers and expiration dates in the relevant fields. When a certificate number is entered, the notification fields become editable.

6. Use the check boxes to specify who will be notified when the certificates of fitness expire.

7. Select whether notifications will be sent out days, weeks, or months before the expiration dates, and enter a number to specify the lead time.

8. Under **EAP Notification Preferences**, click **ADD NEW** to add contact information specific to the notification process. Use the red and white X icon to remove individual contact methods.

My Shortcuts

- Use the **Select property** drop-down list to select a property to which the shortcut settings will apply.

- In the Shortcuts box, click the plus signs to expand the lists for each menu category, and use the check boxes to select shortcuts that will appear under the elements in the Main Menu Bar.

- Use the check boxes under **Select visible pods** to specify which pods will be visible on the left side of every page.

- Click **Apply to all my properties** to use this configuration across all properties to which you have access.

Notification Preferences

- Select whether notifications will be sent in HTML or in Plain Text

- Use the checkbox to select which property you wish to set notification preferences for. A section will expand that you can use to configure when and how you will receive notifications. Leave the **E-mail** and **Pager** fields cleared if you do not want to receive notifications.

Viewing Tenant Communications

Tenant communications are stored for future review. To view tenant communications, follow these steps:

1. Under **AMENITIES > TENANT COMMUNICATIONS**, select **Announcements**, **Links**, or **Documents** to view a page listing all communications of that type (Figure 9).

Figure 9. The Announcements Page

2. Select an announcement, link, or document you wish to access by clicking the link for that communication.

Adding New Users

Depending on your access as established by property management, you may be able to create new user profiles for your company. To create a new user profile, follow the steps below:

1. On the **Main Menu Bar**, click **ADMIN > USERS > ADD NEW USER**.

2. This launches a page where you can select a company for the new user. The **Company Name** field is filled in by the system. Click **FIND**.

3. Select the option button in the **Action** column next to the desired company name, and click **ADD USER**.

4. Enter information for the new user on the **Add New User** page. Required fields are marked with a blue asterisk. On the **Add New User** page, you can perform the following actions.

   ▪ Determine whether the user will be active or inactive with the **Active** check box.

   ▪ Send the new user their login details upon creation by selecting the **Send Username and Password** check box.

   ▪ Determine the new user's default password with the **Reset Default Password** check box and the **Password** and **Confirm Password** fields.

   ▪ Fill in the new user's information. The **First Name**, **Last Name**, and **Email Address** fields are required.

   Note
   Each email address within the Workspeed system must be unique. If an email address that is already associated with another account is entered in this field, creation of the account will fail and the creator will receive an error message.

- Fill in the new user's address or use the **Same as Entity's Address** check box to fill in the company address

5. Click the **Edit** icon in the **Select Business Functions** section and select the security level appropriate for this user based on the privileges detailed in Table 1 below.

Table 1. New User Permissions

Access/Capability	Tenant 1	Tenant 2	Tenant3	Tenant4
Create Service Request	Yes	Yes	Must be authorized	Visitor only
View All Requests	Yes	No	No	Yes
Authorize Requests	Yes	Yes	No	No
Create Freight Elevator Reservation	Yes	No	No	No
Approve Cost Estimates	Yes	Yes	No	No
Sign Off Completed Requests	Yes	Yes	No	No
Perform User Administration	Yes	No	No	Tenant 4 users (optional)

Note

Only Property Management can add users with Tenant 1 permissions. These are primary contacts.

6. Click **CREATE** to create the new user.

7. Once the user has been created, you can select **DEFAULT LOCATION** from the vertical menu on the left to designate a default location for the newly added user *(optional)*.

Finding Additional Help

For additional help on these or other Workspeed topics, click **Help** in the **Workspeed Tools** bar at the top of every page in the product. This will direct you to the Workspeed help where you can search for specific help.