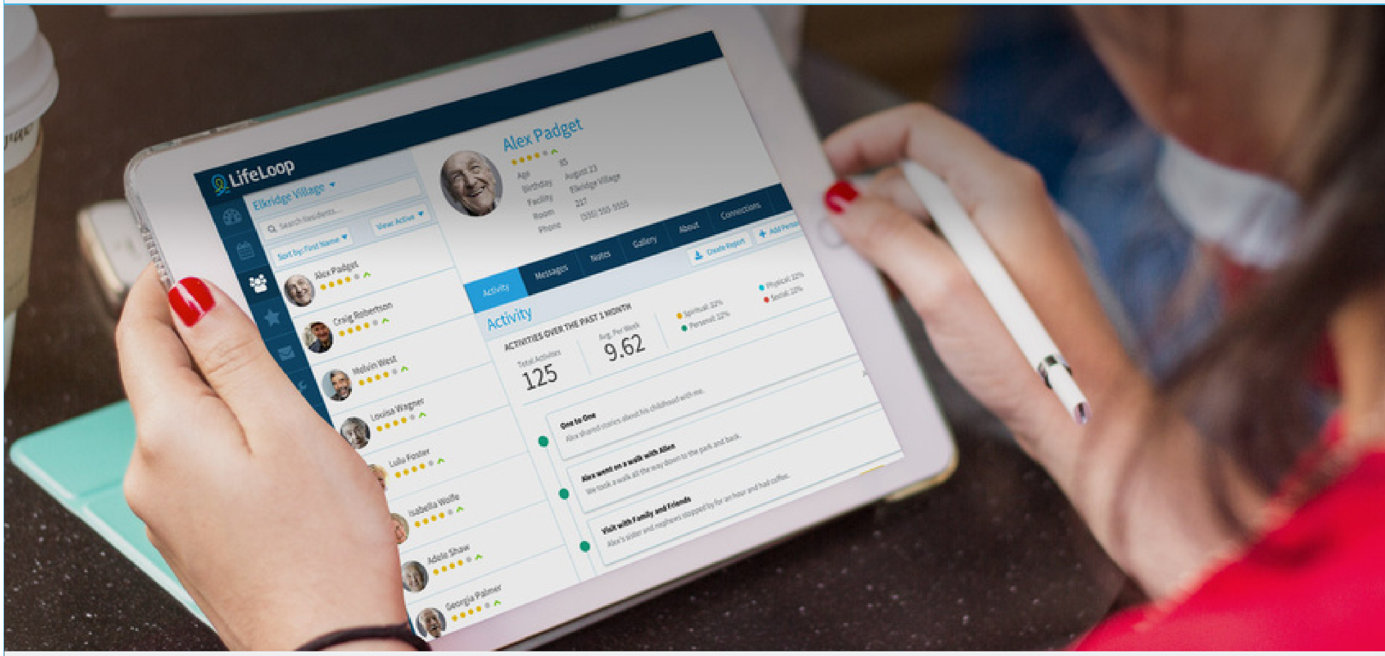
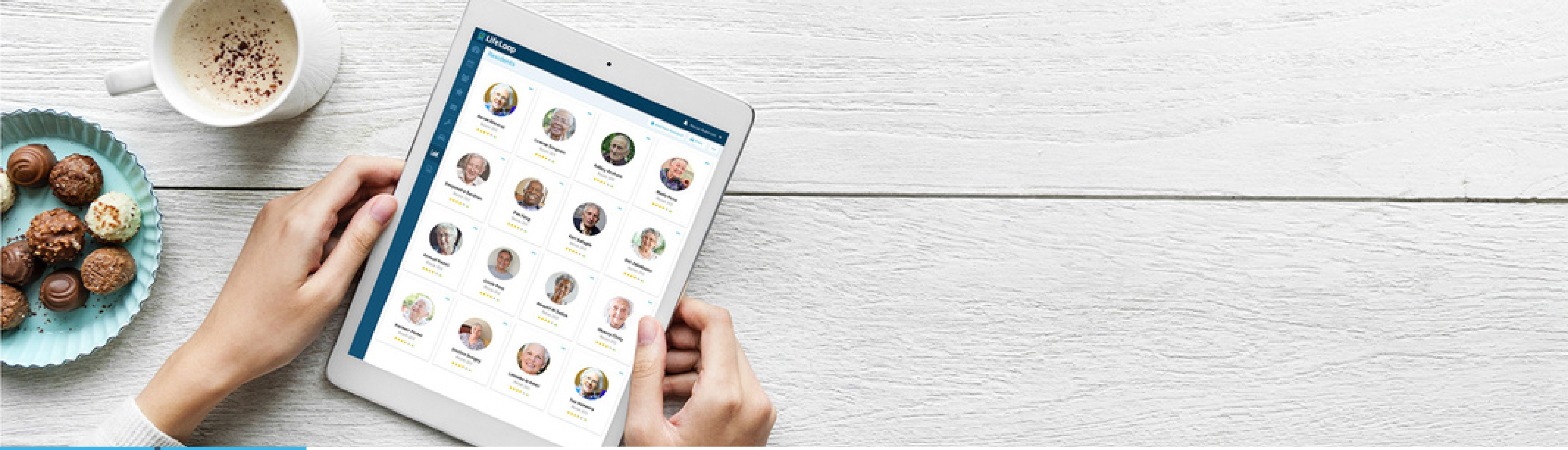
LIFELOOP TRAININGS



WORK REQUESTS

How to create and manage work requests.



LIFELOOP TRAININGS

INDEX

LIFELOOP TRAININGS

WORK REQUESTS

WORK REQUEST SETTINGS

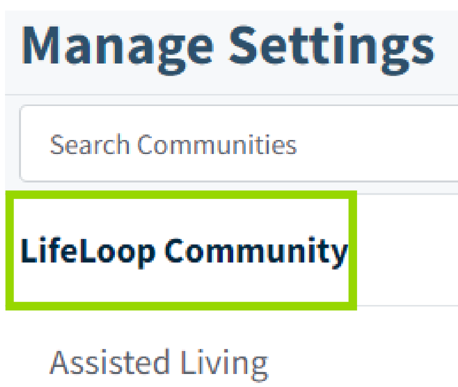
STEP 1

Open your settings by clicking on the Gear Icon on the top right-hand side of your screen.

Note: *If you do not see this icon, you do not have the permission to make changes to your settings. To get this permission, please contact your community LifeLoop Champion or support@ourlifeloop.com for assistance.*

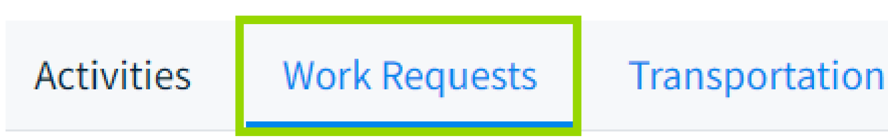
STEP 2

On the left-hand side under Manage Settings, click on your **bolded community name.**



STEP 3

Click on **Work Requests** on the top.



WORK REQUESTS

WORK REQUEST SETTINGS

STEP 4

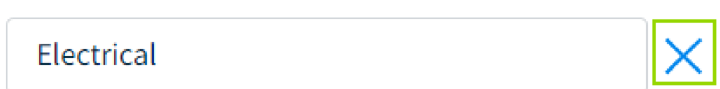
Under Types, enter in any Types of Work Requests you may have such as Electrical or Plumbing. Types are a great way to identify in reports what type of requests are being made and how often. You can also have a billing type if you charge for certain work requests and then run a report on the billables.

STEP 5

Click **Create Type** to add the Type to your list.

STEP 6

To remove a Type from your list, click the X next to the name.



LIFELOOP TRAININGS

WORK REQUESTS

WORK REQUEST SETTINGS

STEP 7

Under Locations, enter in any locations that you may perform Work Requests in such as "Lobby". You only need to include communal locations here. All resident requests will be tied to their room #'s automatically.

Locations

Location Name

Lobby

STEP 8

Click **Create Location** to add the location to your list.

Create Location

STEP 9

To remove a location from your list, click the X next to the name.

Lobby

Note: *Work Requests Team assignments can be done in staff profiles. What Teams are available for Work Requests are handled at the account level, if you need additional options, to edit or remove please contact support@ourlifeloop.com.*

WORK REQUESTS

WORK REQUEST TEAMS

WHERE CAN I EDIT, REMOVE OR ADD TEAMS?

Teams are setup when your LifeLoop account is setup. Only LifeLoop's Support Team can edit, remove or add Teams. Please reach out to support@ourlifeloop.com if you have any additional questions on this.

HOW DO I ASSIGN A STAFF MEMBER TO A TEAM?

Assigning a staff member to a Team is done within the staff member's profile. Please see next page for step-by-step instructions on how to assign staff to a Team.

IF A STAFF MEMBER IS ASSIGNED TO A TEAM WILL THEY BE ABLE TO SEE OTHER TEAM'S REQUESTS?

Staff will only see the requests for the Team or Teams they are assigned to.

CAN STAFF CREATE A WORK REQUEST IF NOT ON A TEAM?

Staff can only create a work request for the Team or Teams they are assigned to and they must have the Create Work Requests permission.

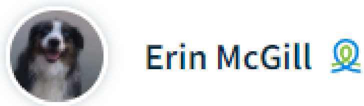
LIFELOOP TRAININGS

WORK REQUESTS

WORK REQUEST TEAMS

STEP 1

To assign a staff member to a team, locate and open the staff profile that you would like to assign to a Team.

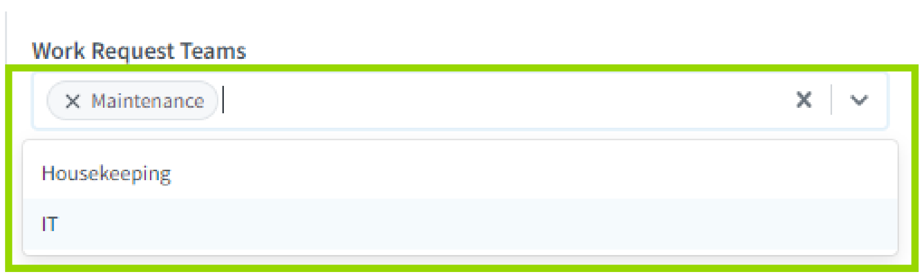


STEP 2

Once inside the staff profile, scroll down until you see "Work Request Teams".

STEP 3

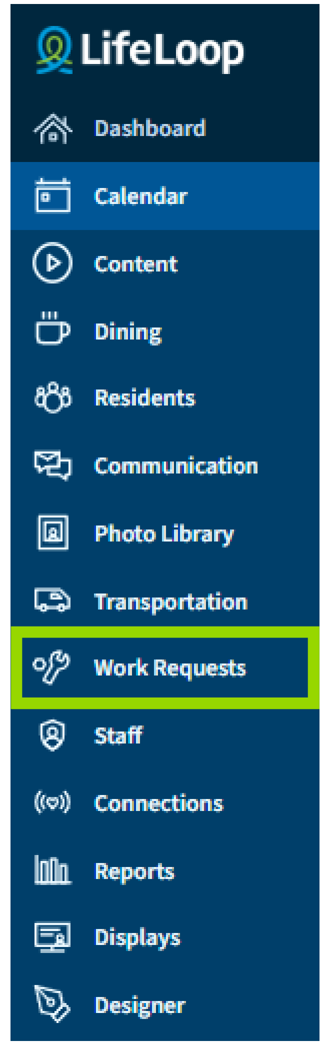
Click on **Choose Teams** to select one or multiple Work Request Teams for this staff member to be assigned to.



Note: *If you do not see this Work Request Teams section in this staff member's profile, please check that their Permissions include "View Work Requests" at the minimum.*

WORK REQUESTS

CREATING A NEW WORK REQUEST



STEP 1

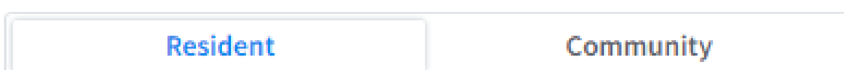
Go to Work Requests in the feature menu on the left-hand side.

STEP 2

Click on **+ New Request** on the top right-hand corner. This will open the Create Request Form.

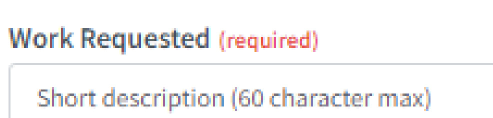
STEP 3

Select if this is a Work Request for the Community or for a Resident.



STEP 4

Add a Work Requested Short Description such as "Light Bulb Needs Changed".

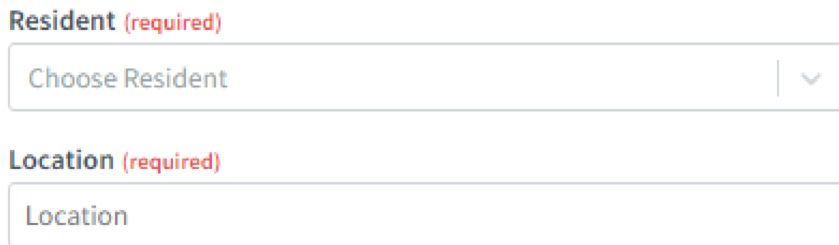


WORK REQUESTS

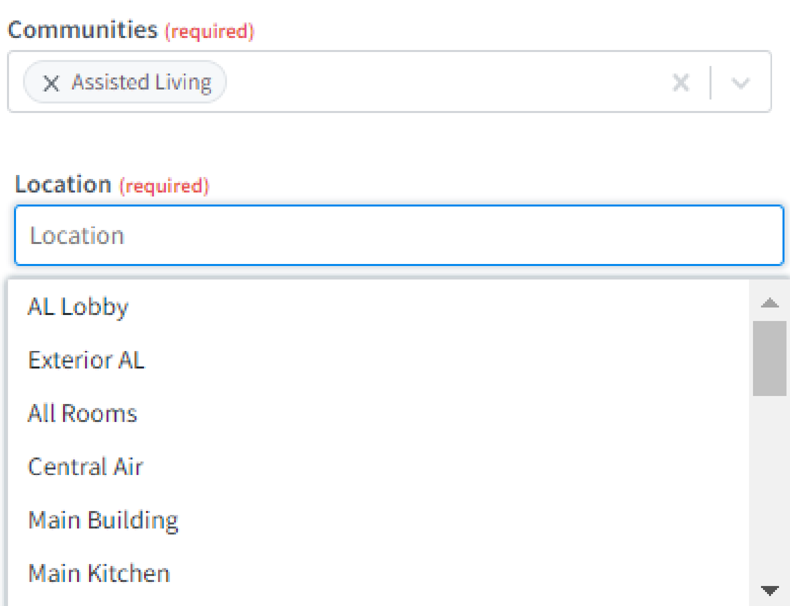
CREATING A NEW WORK REQUEST

STEP 5

For a Resident Work Request, choose a resident from the resident dropdown list. The resident's unit number will auto-populate in the location field.



For a Community Work Request, choose which community the request is for in the communities field. Next, select the location either from the dropdown, which are the locations previously inputted into manage settings, or type one in if it is not listed.

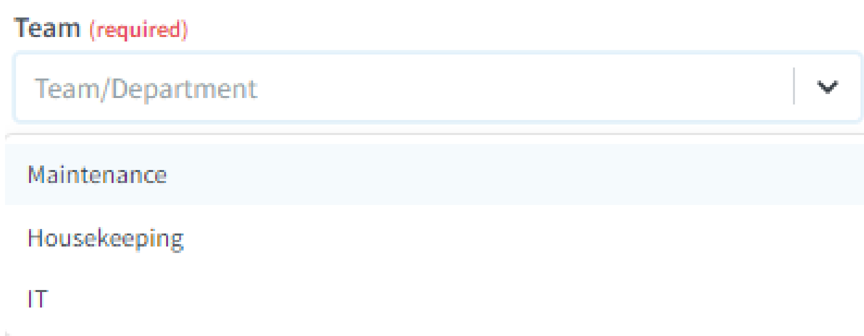


WORK REQUESTS

CREATING A NEW WORK REQUEST

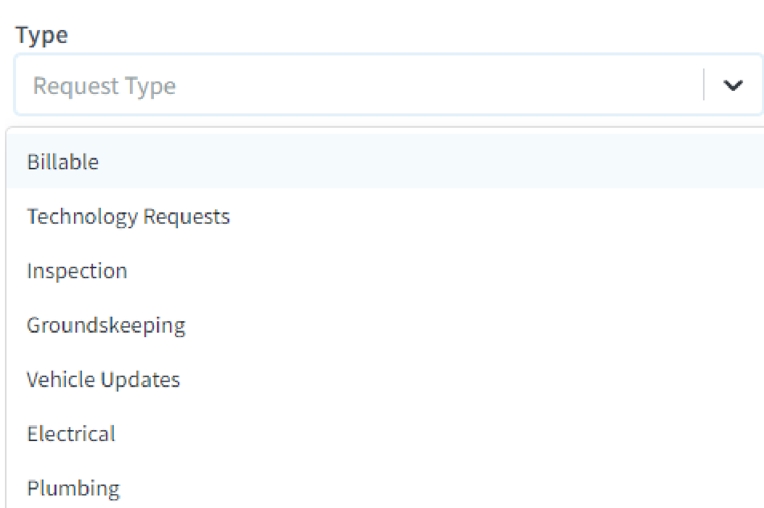
STEP 6

Assign a specific Team to the work request. Click on **Team** to view your Teams and select the relevant one. These Team options are for the account level and were created upon setup. If you would like to edit reach out to your LifeLoop Relationship Specialist or support@ourlifeloop.com



STEP 7

Assign a type to the work request. Click on **Request Type** to select from the dropdown, which contains types previously inputted into manage settings.

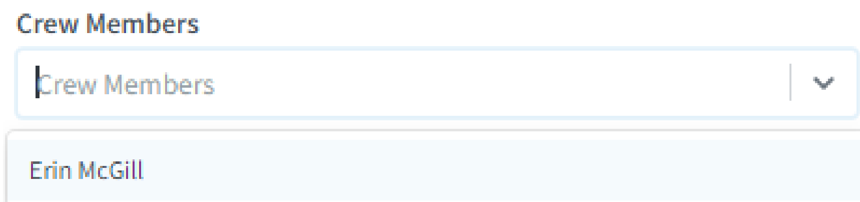


WORK REQUESTS

CREATING A NEW WORK REQUEST

STEP 8

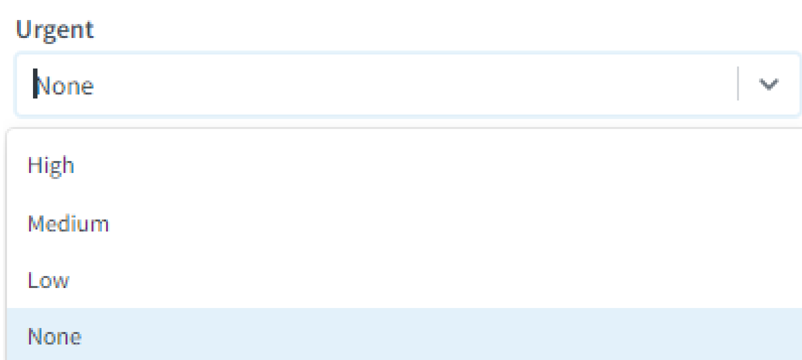
Assign a crew member to this request. Click on **Crew Members** and all staff that are assigned to that Work Request Team will show on this list.



Note: *If you do not see a staff member in your Crew Member's dropdown, they are not assigned to this specific Team. Go to their staff profile and add them to the correct Work Request Team.*

STEP 9

Choose a level of urgency to this request. Click on **None** to open the dropdown and select a level.



Note: *Staff will need the "Manage Work Requests" permission in order to add Crew Members, Urgency, or set a schedule date to a request.*

WORK REQUESTS

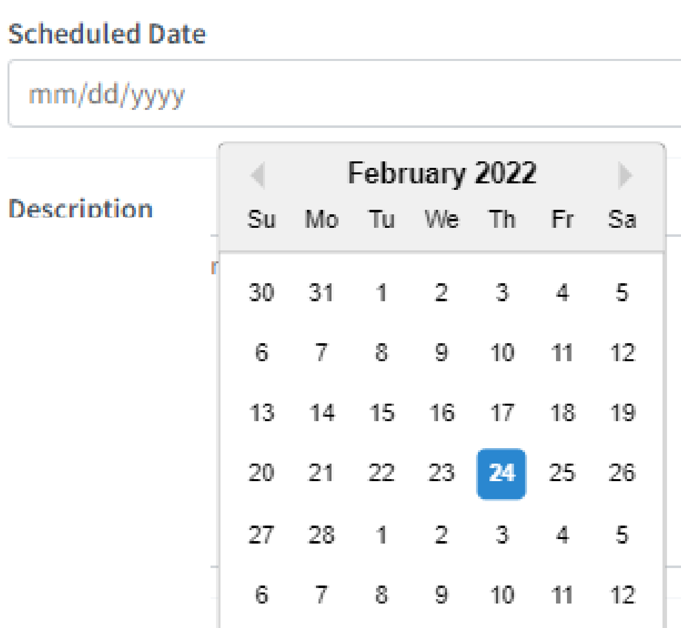
CREATING A NEW WORK REQUEST

STEP 10

If this request is preventative or a recurring request, click on **Setup Recurring**. To learn more about Recurring Requests, refer to Section 6: Recurring Requests.

STEP 11

If this request needs to be completed on a specific date, click **Scheduled Date**. To learn more about Scheduled Requests, refer to Section 7: Scheduled Requests.

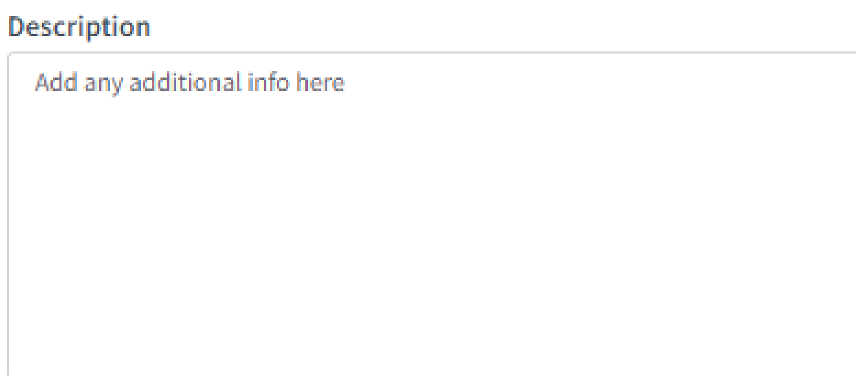


WORK REQUESTS

CREATING A NEW WORK REQUEST

STEP 12

Add a Description to the description box with any additional details regarding this request.



STEP 13

Click **Add Attachments** to add any PDFs or images to your request.

STEP 14

Once you have completed the new request form, click **Create Request** on the bottom right-hand side.

LIFELOOP TRAININGS

WORK REQUESTS

ASSIGNING TEAM MEMBERS

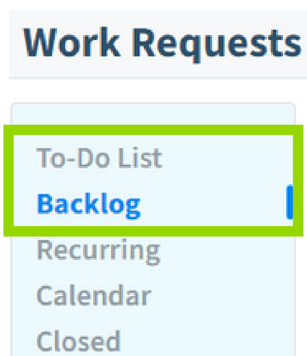
Note: *Team members can be assigned to a request when it is created or they can be assigned after creation. This section reviews how to assign after creation.*

STEP 1

Go to Work Requests in the feature menu on the left-hand side.

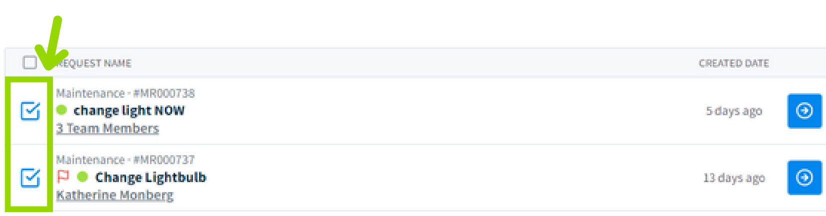
STEP 2

Click on **To-Do List or Backlog** located in the light blue menu on the left-hand side.



STEP 3

To assign a crew member to a request or multiple requests, click on the check box to the left of the request(s) you would like to assign them to.



WORK REQUESTS

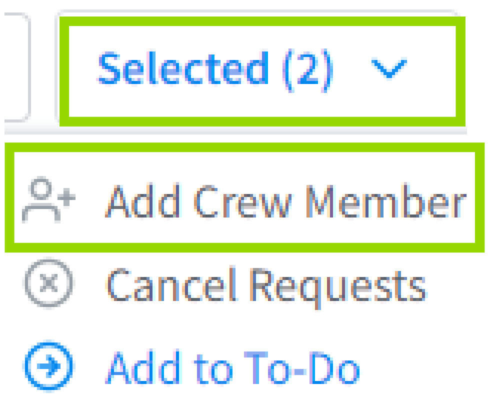
ASSIGNING TEAM MEMBERS

STEP 4

Click on Selected that now appears to the right of the search bar.

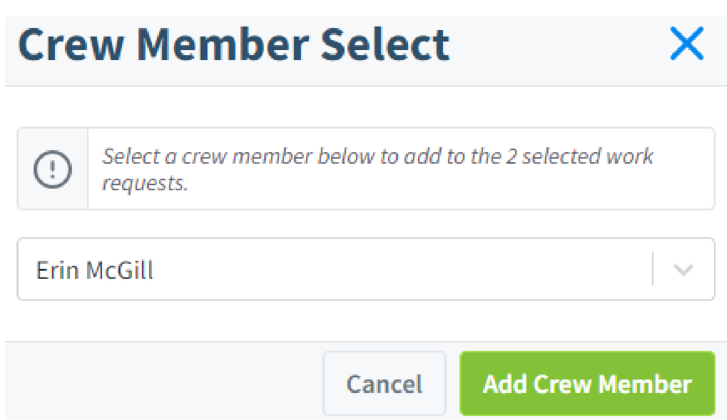
STEP 5

Click on **Add Crew Member.**



STEP 6

Select the crew member you would like to assign to that request from the dropdown and click **Add Crew Member** once selected.



WORK REQUESTS

BACKLOG REQUESTS

WHAT ARE BACKLOG REQUESTS?

Backlog requests include any new requests that are not recurring and have not been assigned to the To-Do list yet as well as any scheduled requests prior to their due date.

CAN I PRINT MY BACKLOG LIST?

You can print the list of work requests on the backlog list by clicking on Print/Export on the top right-hand side and selecting work requests.

WHY DO SOME BACKLOG REQUESTS HAVE A GREYED-OUT ARROW NEXT TO THEM?

This means they are scheduled requests and will automatically be added to the To-Do List on their scheduled date. To move a scheduled request to the To-do list prior to its scheduled date, check the box next to the request, click selected on the top and click Add to To-Do.

WORK REQUESTS

BACKLOG REQUESTS

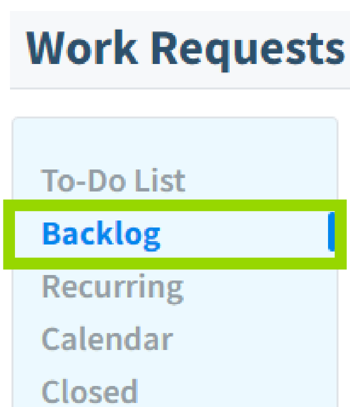
MOVING A REQUEST FROM THE BACKLOG TO THE TO-DO LIST

STEP 1

Go to Work Requests in the feature menu on the left-hand side.

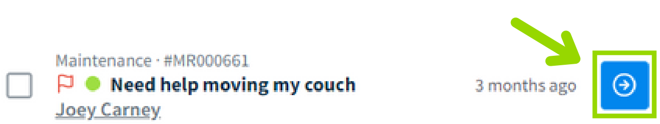
STEP 2

Select **Backlog** located in the light blue menu on the left-hand side.



STEP 3

If you would like to only move one request at a time to the To-Do List, click the **blue arrow** next to the request that you would like to move.



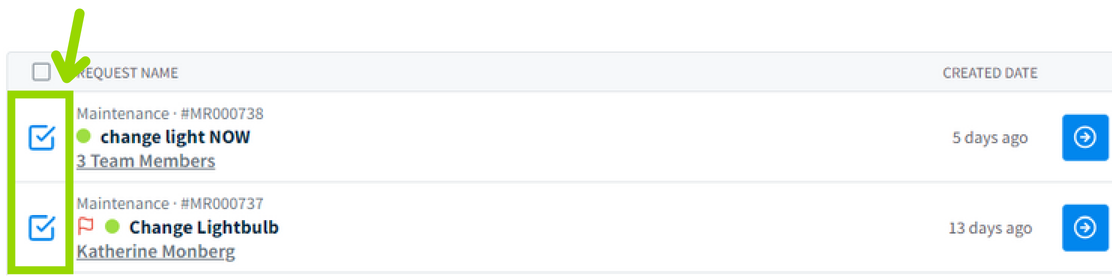
WORK REQUESTS

BACKLOG REQUESTS

MOVING A REQUEST FROM THE BACKLOG TO THE TO-DO LIST (CONT.)

STEP 4

To move multiple requests from the Backlog to the To-Do list at the same time, click on the **check boxes** on the left-hand side of each request you would like to move.

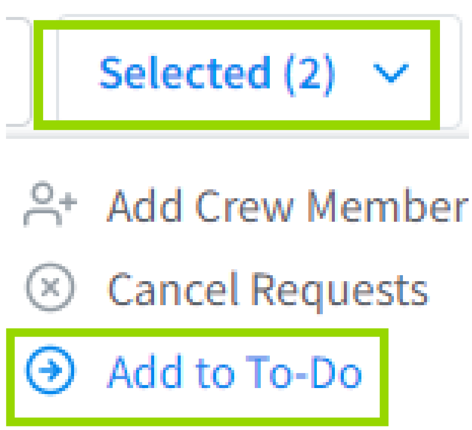


STEP 5

Click on **Selected** that now appears to the right of the search bar.

STEP 6

Click on **Add to To-Do List.** This will now add all selected requests to the To-Do List.



WORK REQUESTS

RECURRING REQUESTS

WHAT ARE RECURRING REQUESTS USED FOR?

Recurring requests are great for work requests that need to be worked on once a week, once a month, every 6 months, etc. Several examples are changing AC filters, fire alarm checks, vacuuming the lobby etc. When referring to Maintenance Requests specifically these can be known as Preventative Maintenance Requests.

WHY CAN'T I MOVE A RECURRING REQUEST TO THE TO-DO LIST?

Recurring requests will automatically move to the To-Do List on the recurring date, therefore you do not need to manually move them.

WHAT HAPPENS TO MY TASKS ON A RECURRING REQUEST?

Any tasks added to a recurring request will stay attached to the request each time it is due. The tasks will show as incomplete until they have been completed for that single recurring occurrence.

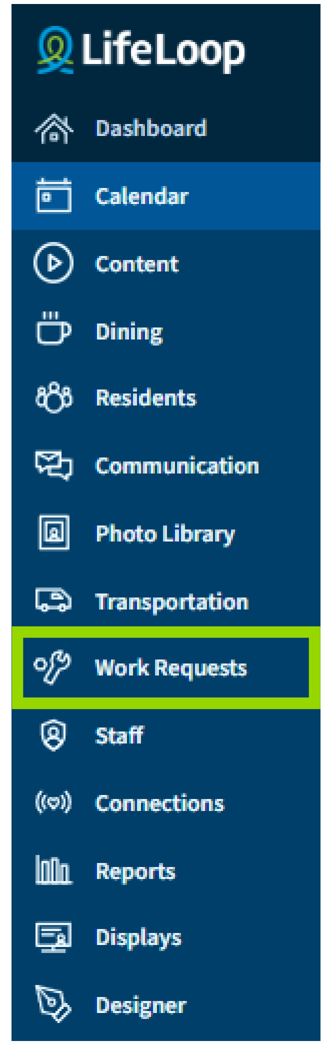
HOW CAN I EASILY IDENTIFY A RECURRING REQUEST?

This double sided arrow icon will be next to any requests that are recurring.

WORK REQUESTS

RECURRING REQUESTS

CREATING A RECURRING REQUEST

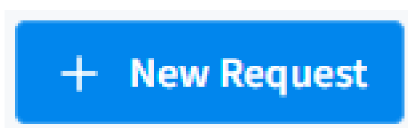


STEP 1

Go to Work Requests in the feature menu on the left-hand side.

STEP 2

Click on **+ New Request** on the top right-hand side.



STEP 3

When creating your new request, click on **Setup Recurring.**

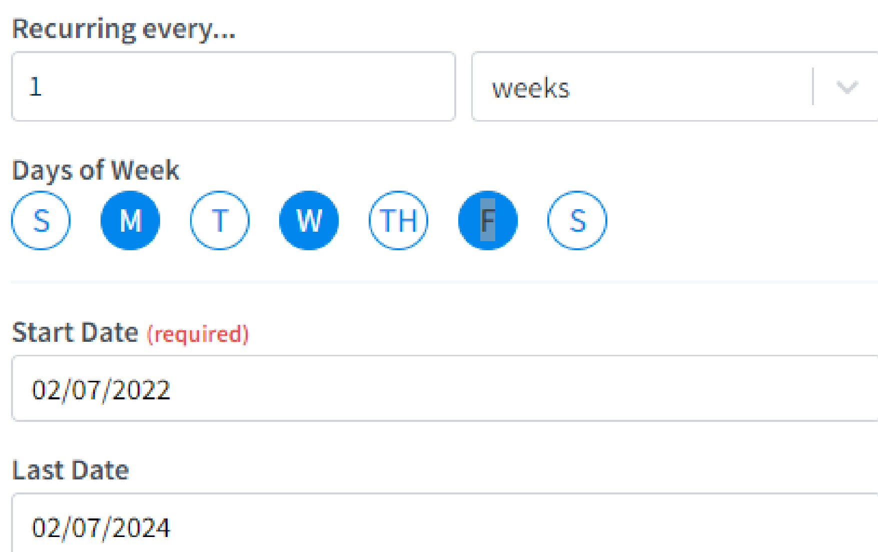
WORK REQUESTS

RECURRING REQUESTS

CREATING A RECURRING REQUEST (CONT.)

STEP 4

Select your recurring pattern and how often you would like this request to recur. For example, a recurring request can be every day, once a week, or the first Monday of each month. Also select when this request series should start and end. By default, the last date extends two years from the start date.



STEP 5

Click **Apply Changes** on the bottom right-hand side.

WORK REQUESTS

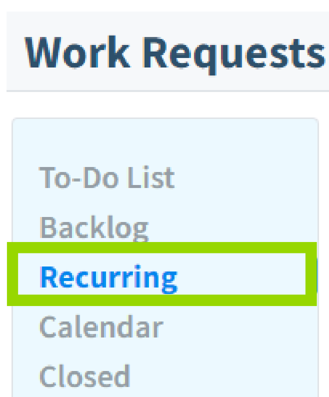
RECURRING REQUESTS

CREATING A RECURRING REQUEST (CONT.)

STEP 6

Once you have completed filling out the New Request form, click **Create Request** on the bottom right-hand side.

Your new request has now been added to the Recurring section in the light-blue tool bar. Click on **Recurring** to view this request.



Note: *This request will automatically move to your To-Do list on the next recurring date. Once marked completed, a single occurrence of this recurring request will be moved to the closed list. The recurring pattern will continue and the request will remain in the Recurring tab until the pattern is complete.*

WORK REQUESTS

SCHEDULED REQUESTS

LIFELOOP TRAININGS

WHAT ARE SCHEDULED REQUESTS USED FOR?

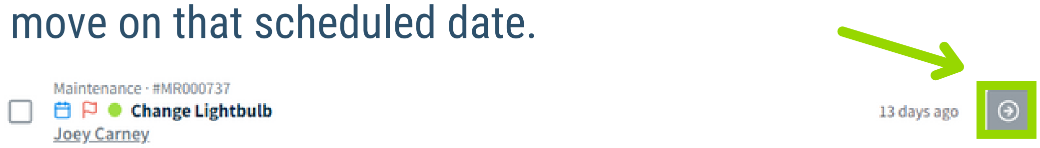
Scheduled Requests are great for requests that you know can only be done on a specific day, or need to be done by a specific date.

WHY CAN'T I MOVE A SCHEDULED REQUEST TO THE TO-DO LIST?

Scheduled requests are set to automatically move to the To-Do list when it is the scheduled date. You do not need to move them as they will do so themselves.

WHY ARE MY SCHEDULED REQUESTS "MOVE TO TO-DO LIST" BUTTON GRAYED OUT ON MY BACKLOG?

This is grayed out on the backlog because it is scheduled for a specific day and will automatically move on that scheduled date.



WHAT SYMBOLIZES A SCHEDULED REQUEST?

This calendar icon will be next to any requests that have been scheduled.

WORK REQUESTS

SCHEDULED REQUESTS

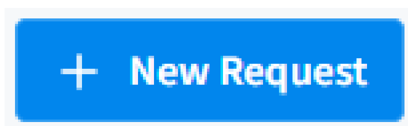
CREATING A SCHEDULED REQUEST

STEP 1

Go to Work Requests in the feature menu on the left-hand side.

STEP 2

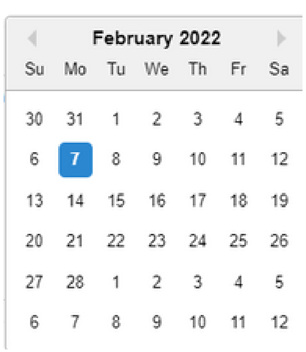
Click on **+ New Request** on the top right-hand side.



STEP 3

When creating your new request, click on **Scheduled Date.**

This will populate a calendar so you can easily select the specific date this request needs to be scheduled for.



WORK REQUESTS

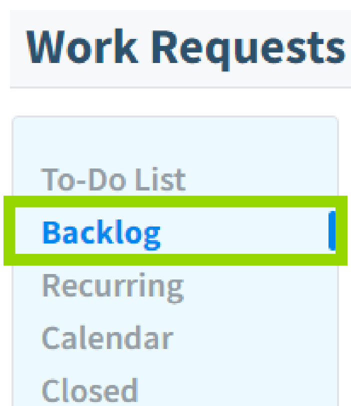
SCHEDULED REQUESTS

CREATING A SCHEDULED REQUEST (CONT.)

STEP 4

Once your request is completed, click **Create Request** on the bottom right-hand side.

Your new request has now been added to the Backlog tab on the light-blue tool bar. Click on **Backlog** to view this request.



Note: *This request will automatically move into your To-Do list on its scheduled date. Once marked completed, it will be moved to the closed list.*

WORK REQUESTS

WORK REQUEST CALENDAR

WHAT DOES THE CALENDAR SHOW?

The calendar will show you Recurring Requests up until the present date, any scheduled requests and completed requests.

CAN I FILTER REQUESTS ON THE CALENDAR TO ONLY VIEW ONE TEAM MEMBERS REQUESTS?

Absolutely! Click on Filter and select the team member's calendar you would like to view.

ARE THE REQUESTS ON THE CALENDAR CLICKABLE?

Yes! First select the day of the request you would like to view then click on the request. This will take you directly into the work request details.

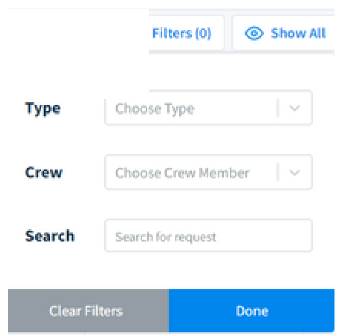
LIFELOOP TRAININGS

WORK REQUESTS

WORK REQUEST CALENDAR

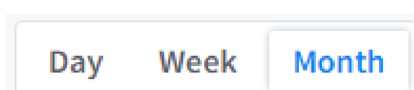
FILTERS

Use filters to show only specific types of work requests, specific crew members, or to search for a specific request.



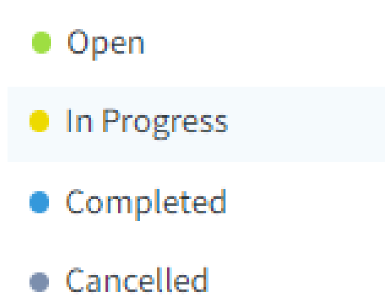
VIEWS

You can easily view your calendar differently by selecting Day, Week and Month view.



COLORS

The color dots signify the status of the request.



WORK REQUESTS

TASKS

LIFELOOP TRAININGS

WHAT ARE TASKS USED FOR?

Tasks can be added to any work request. Tasks are items that are required to be done for the request as a whole to be considered complete.

CAN I COMPLETE A WORK REQUEST WITH TASKS THAT HAVE NOT BEEN COMPLETED?

No. You must complete all tasks on a work request in order to complete it.

CAN I EDIT AN ALREADY CREATED TASK?

Yes. Next to a task, click on the three dot icon ••• and select Edit.

HOW DO TASKS ON A RECURRING REQUEST WORK?

The tasks on a recurring request will stay with the recurrence and will refresh each time an occurrence in the series is due and moves to the To-Do list.

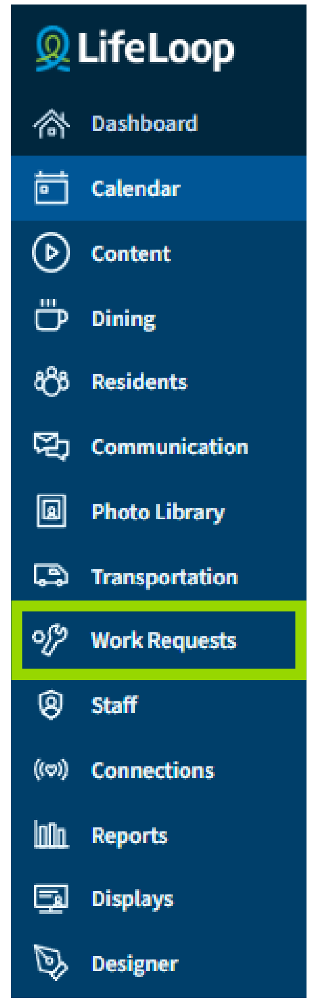
WORK REQUESTS

TASKS

ADDING A TASK TO A REQUEST

STEP 1

Go to Work Requests in the feature menu on the left-hand side.

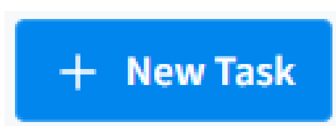


STEP 2

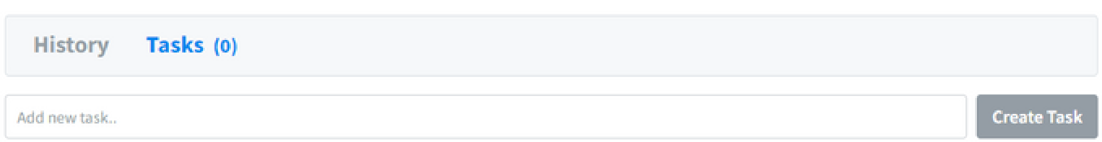
Open the request you would like to assign a task to by clicking on it.

STEP 3

On the top right-hand side, click on **+New Task.**



This will open a free-form text box under Tasks for your input. Type in the task you would like to add.



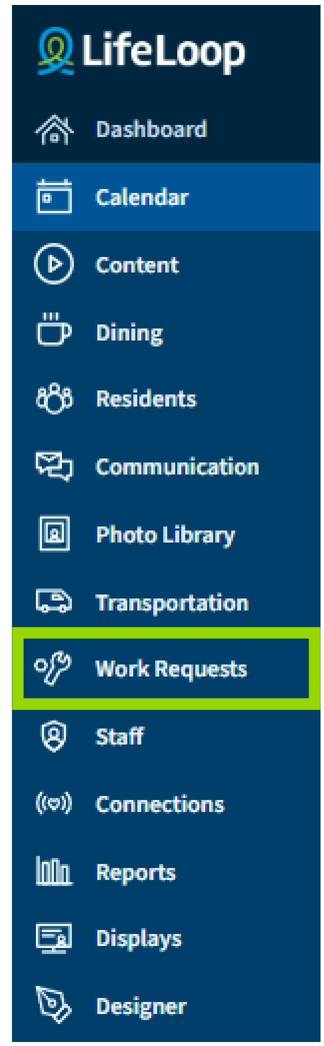
STEP 4

Click **Create Task.**

WORK REQUESTS

TASKS

MARKING A TASK COMPLETED



STEP 1

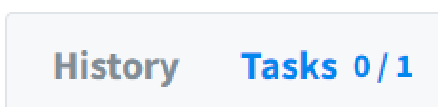
Go to Work Requests in the feature tool bar on the left-hand side.

STEP 2

Open the request details of the request you would like to view by clicking on the work request.

STEP 3

Click on **Tasks** on the bottom of the request details.



Note: *The number next to Tasks shows how many tasks have been completed out of the total amount of tasks on the request.*

STEP 4

Once you have completed a task click on the check mark ✓ next to it.

WORK REQUESTS

RESIDENT AND FAMILY REQUESTS

HOW CAN I TELL IF A RESIDENT OR A FAMILY MEMBER SUBMITTED THE REQUEST?

Next to any request submitted by a family member or resident, you will find a flag icon . If you hover your mouse over the request, a prompt will appear saying Submitted by Resident or Submitted by Family. Once inside the request details, under the History tab, you can also find who created it and when.

ARE ALL COMMENTS VIEWABLE TO FAMILY AND RESIDENTS?

Only if you want them to be. When adding a comment to a request, you can check a box to confirm if you want to publish the comment to be viewable to connections and residents.

CAN I EDIT A REQUEST SUBMITTED BY A RESIDENT OR THEIR FAMILY?

Yes, as long as you have the manage work request permission.

WORK REQUESTS

RESIDENT AND FAMILY REQUESTS

WHAT IF WE DO NOT WANT RESIDENTS AND CONNECTIONS TO BE ABLE TO SUBMIT REQUESTS?

No problem. This is an optional feature that LifeLoop can turn on or off for you. We suggest, starting with it off for residents and family until your staff is comfortable using Work Requests. Once they are ready, ask support to turn on the feature and allow residents and connections to request their own work requests.

WORK REQUESTS

CLOSED REQUESTS

WHAT REQUESTS SHOW IN MY CLOSED TAB?

The Closed tab shows any requests that have been Completed or Cancelled.

CAN I SEARCH FOR A SPECIFIC CLOSED REQUEST?

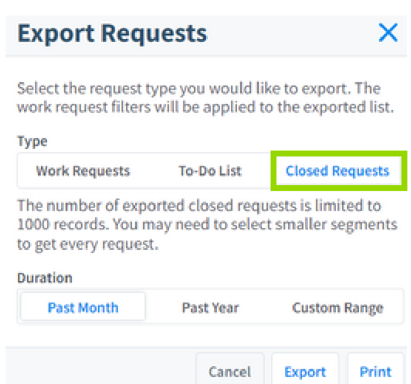
Absolutely! Use the search bar on the top and type in any specific request you would like to find.

CAN I REOPEN A CLOSED REQUEST?

Yes, as long as you have the staff permissions to do so! Open the details of a specific request and change the status to Open or Pending.

CAN I PRINT CLOSED REQUESTS?

Yes! Selecting Print/Export on the top right-hand side will give you the option to select closed requests. You will now be able to select a time period for the closed requests you would like to print.



WORK REQUESTS

CONTINUED LEARNING

ATTEND A UNIVERSITY COURSE

Don't forget about our complimentary LifeLoop University available to you and your team. Courses are provided weekly and cover all LifeLoop features. Emails with the topics and schedules are sent out monthly for you to register to attend.

VISIT THE LEARNING COMMUNITY

Access LifeLoop marketing collateral and training resources at your convenience.
Find the Learning Community by clicking the "?" on the top right-hand side of your screen or going to https://ourlifeloop.com/training/staff.

FURTHER QUESTIONS?

Reach out to Support@OurLifeLoop.com or your Customer Relationship Specialist.