## **MANAGER GUIDE**

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After-hours HVAC scheduling made easy



## Welcome to 7NOX!



Thanks for choosing 7NOX as your after-hours HVAC booking solution! Your tenants can now easily schedule and manage their own after-hours HVAC requests from their desktop or mobile device.



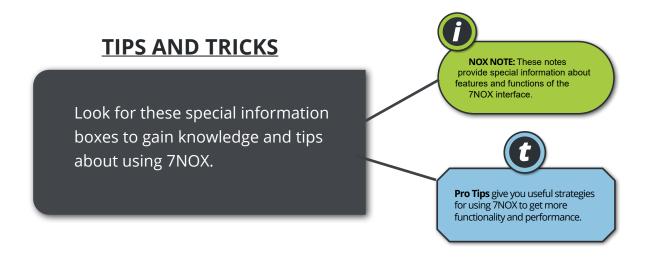
With the 7NOX mobile app, you can schedule on-the-go!

Download on the <u>Apple Store</u> or on <u>Google Play</u>.



### How to Use This Guide

In this **Manager Guide** you will find everything you need to quickly master the 7NOX desktop app. (**Note**: Guides for the 7NOX mobile app can be found on the website **Training Page**).



#### **HOW-TO VIDEOS**

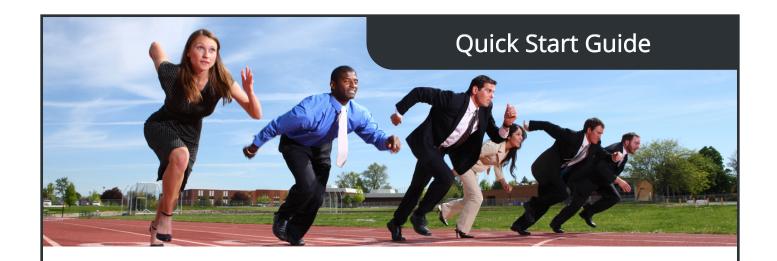




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#### **System Requirements**

**Apple OS** iOS 11.2 or +

Android OS Android 4.0.3 or +

**Browser** Internet Explorer 11+, Firefox 59.0.2+, Chrome 67.0.3396.87+

#### Login to 7NOX Portal

You should have received an email with your login credentials and a URL (e.g., us.7nox.com). If not, email us at <a href="mailto:info@opsyssolutions.com">info@opsyssolutions.com</a>. Otherwise, navigate to the 7NOX portal URL and login. For security, we recommend you change your pre-assigned password after login.

#### Calculate Your Hourly Rate

Have you figured your hourly rate for bookings yet? If not, get started with our **After-Hours Rate Calculator**. While every property and tenancy is different, the Calculator can be a helpful guide in identifying common charges that make up this important charge.

### **Start Learning**

Our <u>Training Page</u> contains a complete library of 7NOX guides and videos.

### **User Training**

<u>Tenant Welcome Guide</u>—Email to tenants for a quick intro to 7NOX.

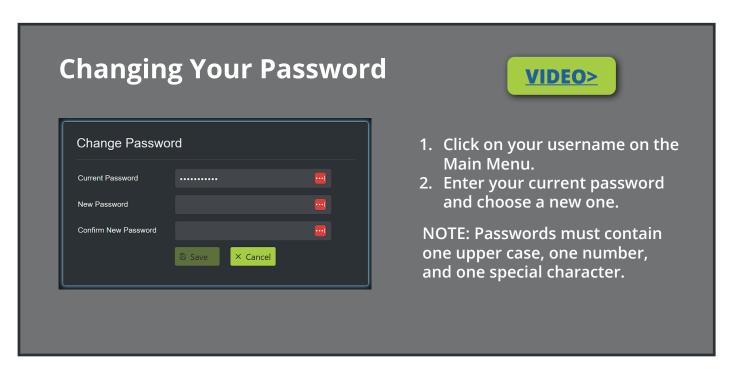
<u>7NOX User Guide</u>—Comprehensive training guide for tenants.

<u>7NOX Mobile App Guide</u>—How to use the 7NOX app for iOS and Android.

## 7NOX Dashboard Overview



- 1 Main Menu—Contains menus for Bookings, Managers, & Reports.
- **Create Area**—The left-hand side of the Dashboard is where you will create and edit bookings, logins, tenants, floors, holidays, reports, and histories.
- **Display Area**—Searchable list of all bookings, logins, tenants, floors, holidays, reports, and histories.

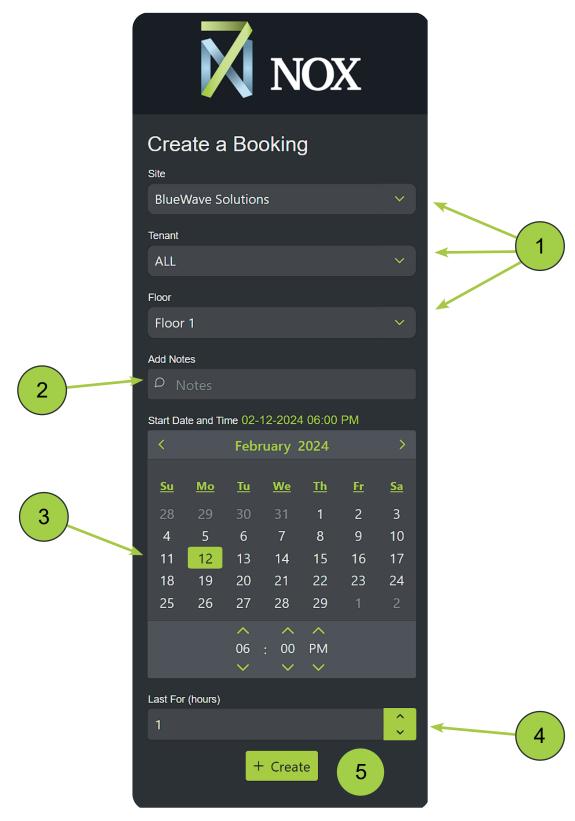


# Create a Booking

#### Location: Main Menu > Bookings > Single Booking

- 1. Set the desired site, tenant, and floor
- 2. (Optional) Add a note
- 3. Choose a date and time
- 4. Enter the number of hours
- 5. Hit the "Create" button





## **Create Repeat Booking**

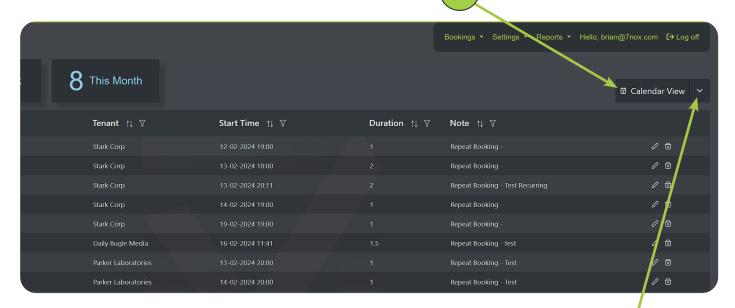
#### Location: Main Menu > Bookings > Repeat Booking

- 1. Set the desired site, tenant, and floor
- 2. (Optional) Add a note
- 3. Choose day(s)
- 4. Set start time
- 5. Enter duration (hrs)
- 6. Set a start and end date
- 7. Hit the "Create" button



## Calendar View

The **Calendar View** feature is an intuitive and visual way for users to quickly make single bookings. The default view for the **Display Area** is the **Table View**. You can switch to the Calendar View by hitting the "Calendar View" button.

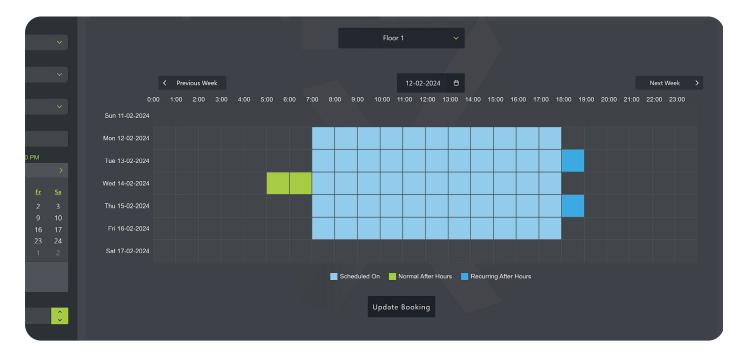


The **Calendar View** button also gives users access to your site's **Occupancy Times**, **Floor Plans**, and the **Event Log**.

2

The Calendar View has three different time types:

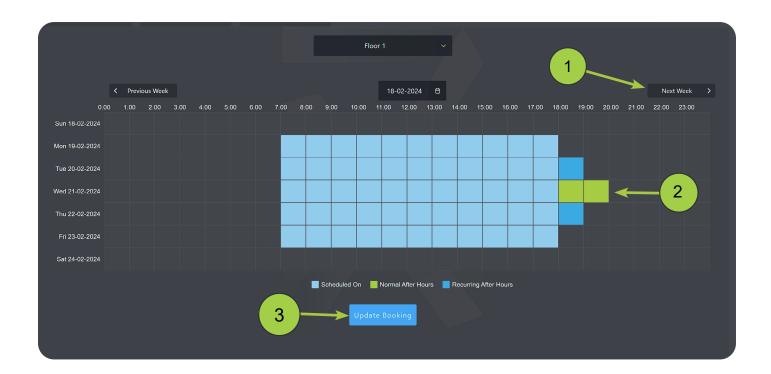
- **Scheduled On:** Site operating hours. Bookings <u>CAN'T</u> be made.
- **Normal After Hours:** Single booking times. Bookings <u>CAN</u> be made.
- **Recurring After Hours:** Recurring bookings. Single bookings <u>CAN'T</u> be made.



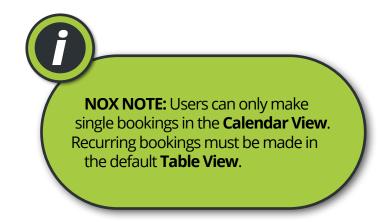
## Create a Booking (Calendar View)

#### Location: Calendar View Button

- 1. Navigate to the desired week
- 2. Click available squares for day(s) and time(s)
- 3. Hit the "Update Booking" button
- 4. Choose "Yes" in the popup window to save changes



After creation, your booking will be visible in the default **Table View**, where you can add notes, edit times, etc.



## Site Manager

Location: Main Menu > Settings > Site Manager

The Site Manager lets you manage your contact info, occupancy times, costs, and other settings.

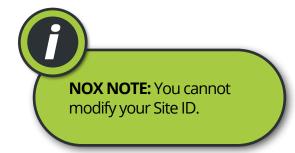
### **Contact Information**

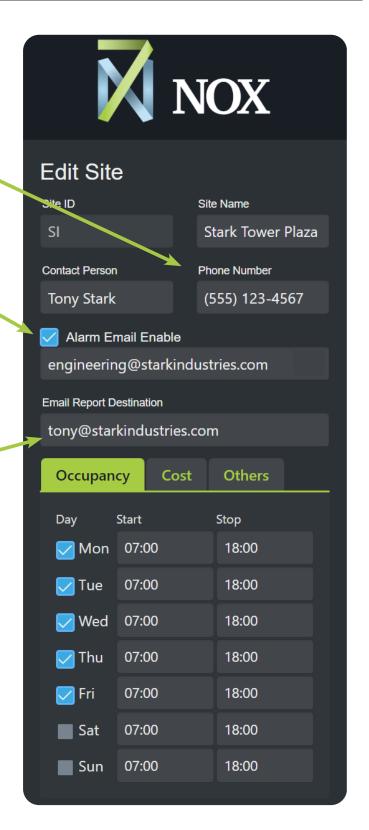
SITE MANAGER

It's important to keep your Site's phone number up-to-date.

Alarm Email Enable notifies someone, like an engineer, if the system goes offline.

Include any emails to receive automated monthly reports. You can add multiple emails by separating them with a semicolon.





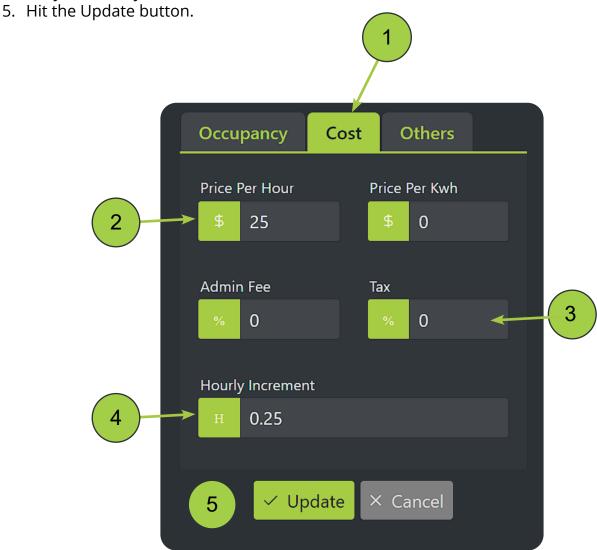
- 1. Click your Site in the Display Area
- 2. Hit the Edit button
- 3. Adjust the days, start and stop times
- 4. Hit the Update button.





The Cost tab in the Site Manager is where you can adjust your fixed rate, taxes, and fees.

- 1. Click the Cost tab
- 2. Adjust your Price Per Hour or kWh
- 3. (optional) Add any Fees & Taxes
- 4. Set your Hourly Increment (see below)\*



<sup>\*</sup>Your Hourly Increment determines the time increments your Users can advance while making bookings. Setting a value of "1" will let Users make bookings in one hour increments, a value of "0.5" will result in thirty minute increments. The Site in the example above allows for 15 minute increments ("0.25").

<u>Other Settings</u> SITE MANAGER

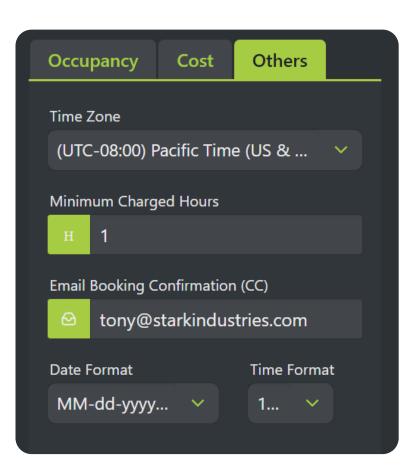
The Others tab in the Site Manager is where you can set your time zone, minimum charged hours, email confirmations and date/time formats. Here are the definitions of the settings in the Others tab.

**Time Zone**—The time zone you want to use for your Site. If your Site contains multiple offices, you'll need to keep this time in mind when setting up Holidays.

**Minimum Charged Hours**—The minimum amount of time you will charge per booking. The example Site below has a MCH of 1. Therefore, any User making a booking less than one hour will still be charged a minimum of 1 hour.

**Email Booking Confirmation**—The email entered will be cc'ed on any confirmation emails. Sites with high after-hours usage can generate many emails, so keep this in mind when cc'ing others.

**Date & Time Fomats**—Set your desired formats for dates. Choose between 12 and 24-Hour time.

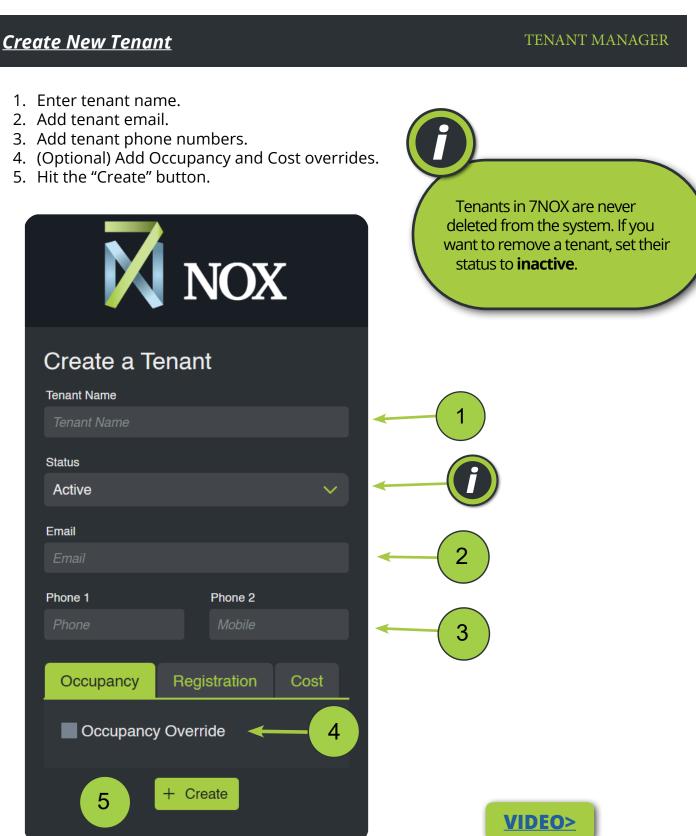




## **Tenant Manager**

#### Location: Main Menu > Settings > Tenant Manager

Tenants are the companies and organizations leasing space in your site (e.g., AAA Auto Insurance). In the Tenant Manager, you can create and manage tenants, apply occupancy and cost overrides, and set the tenant's time zone.

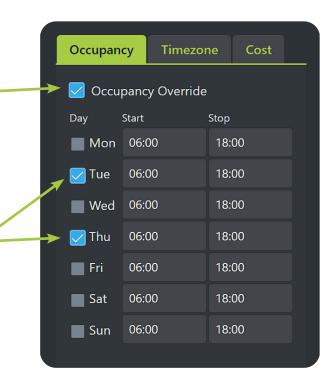


Occupancy Overrides give you more control by letting you customize after-hours times for specific Tenants.

By ticking the **Occupancy Override**, you are overriding your Site's business hours only for the tenant. This allows them to book after-hours HVAC for any time or day.

You may also override the **Occupancy Override** by ticking boxes next to the desired days and times. This essentially redefines the occupancy times for the tenant. Users can only book after-hours outside these times and days.

In this **example,** the tenant will **NOT** be able to schedule after-hours on Tuesdays and Thursday between 6:00 and 18:00.



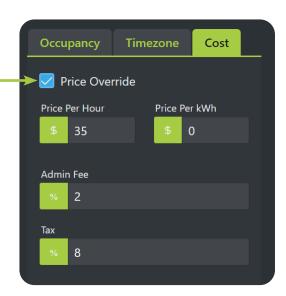
**NOX NOTE:** Changing the occupancy settings requires you to check and update any existing bookings to correct discrepancies.

#### **Cost Overrides**

TENANT MANAGER

By ticking the **Cost Override**, you are overriding your Site's hourly rate *only for the tenant*. This lets you to customize charges based on Tenant need.

The override also lets you charge customized Admin Fees and Tax rates if needed. In this example, the Tenant is charged \$35/hr instead of the Site charge of \$25/hr.



## Login Manager

Location: Main Menu > Settings > Login Manager

The Login Manager lets you can **create, edit or delete** new or existing users. You can manage passwords, and assign each User to a specific site or tenant. There are three different levels of User Accounts: **Manager**, **Coordinator**, and **User**.



### Managers

Intended for FMs and owners. Managers are assigned to sites and can create, delete, or change everything within those sites. Managers can create Coordinators, Users, and other Manager logins.

### Coordinators

Intended for Tenant office managers or similar roles. Coordinators are assigned to specific tenancies and can only create, delete, or change all bookings and Users within those tenancies.

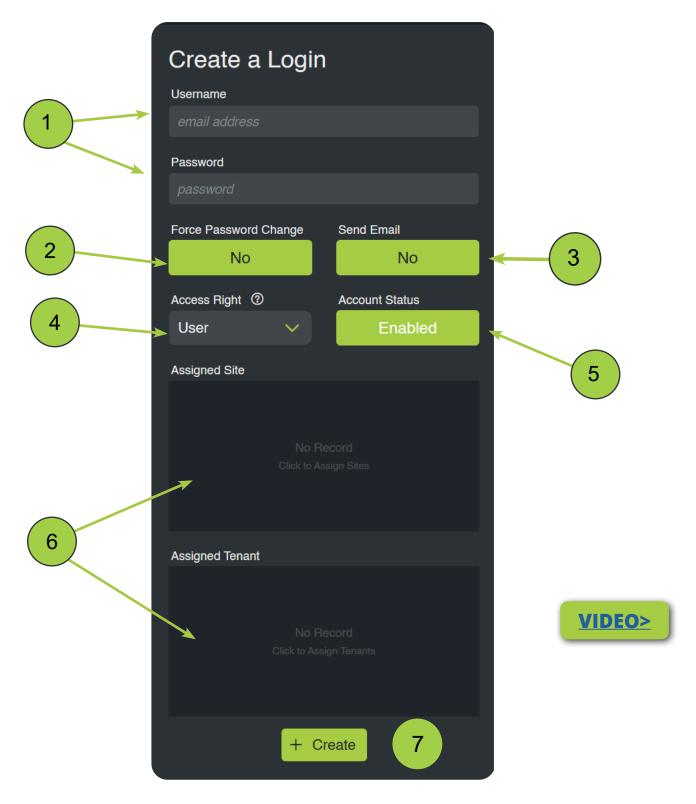




#### Users

Intended for Tenant employees. Users are assigned to specific sites and floors and can only create, delete, or edit bookings for them.

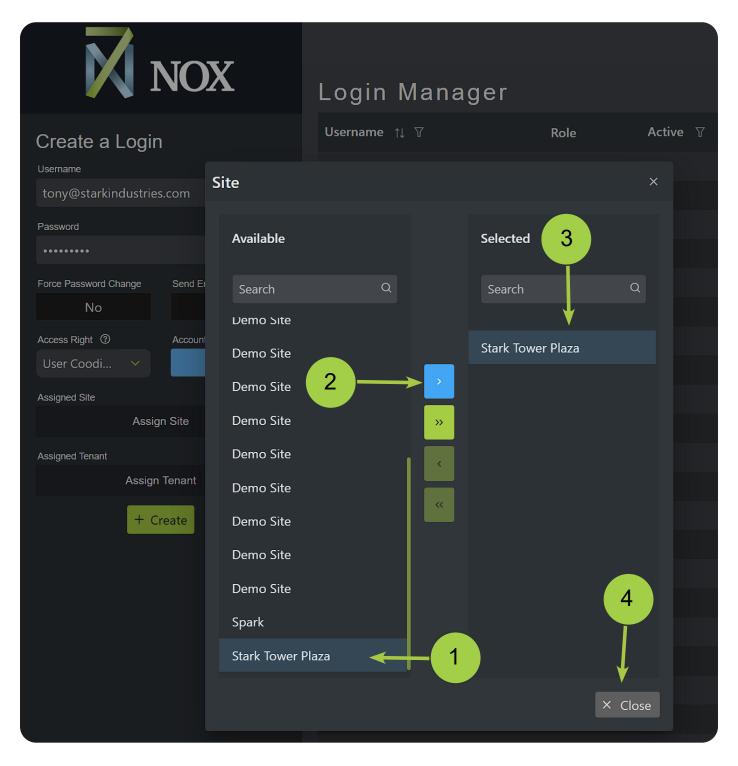
- 1. Enter User email and password
- 2. (Optional) Force User to change their password.
- 3. (Optional) Activate "Send Email" to send Users their login credentials.
- 4. Assign the User's access rights (i.e., Manager, Coordinator, User).
- 5. "Access Status" is enabled by default. You can disable it at anytime.
- 6. Assign the User a Site and Tenancy (see pg 19 & 20).
- 7. Hit the "Create" button.



### **Assigning Users to Sites**

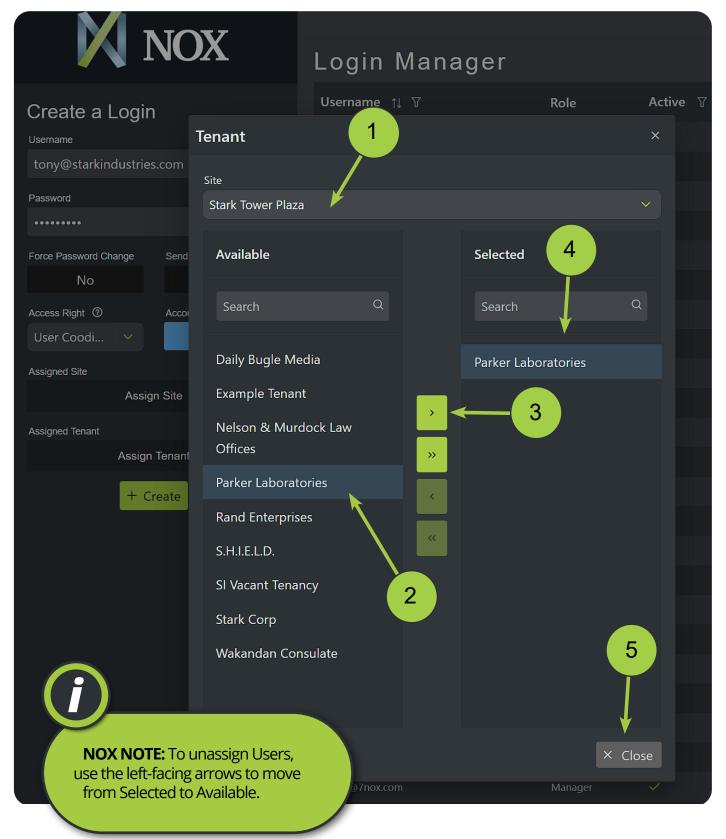
- 1. Select the Site you want to assign to the User.
- 2. Click the single arrow button.
- 3. The Site will move from Available to Selected.
- 4. Hit the Close button.





### **Assigning Users to Tenancies**

- 1. Select the appropriate Site from the dropdown.
- 2. Select the Tenant(s) you want to assign to the User.
- 3. Click the right-facing single (or double) arrow button.
- 4. The Tenant will move from Available to Selected
- 5. Close the popup.



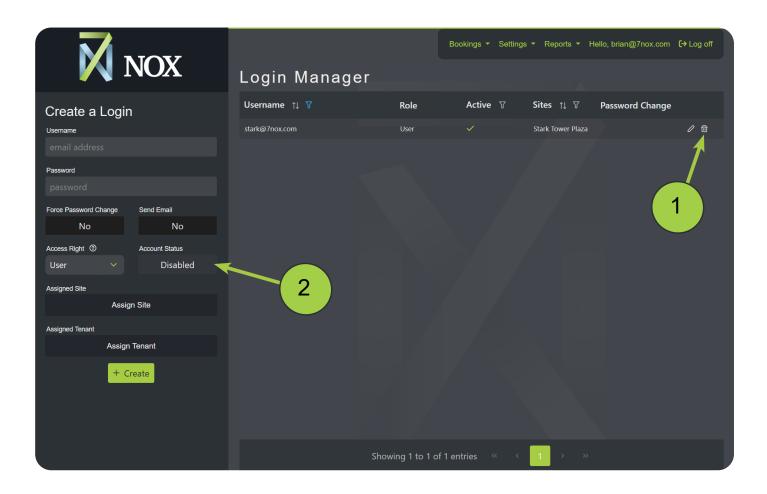
### Removing a User

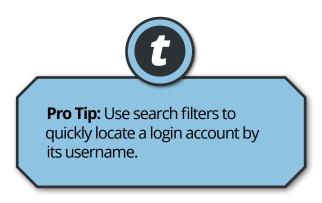
**NOTE:** Disabled users remain in the 7NOX system to ensure reporting accuracy. Therefore, 7NOX Users are never "deleted". If you receive an error message saying "User already exists" when creating a Login account, that means the User account status is set to "Disabled". To renable the account, simply find the User and set the account status back to "Enabled".

There are two ways to remove a User:

- 1. Click the trashcan icon next to the User
- 2. Set the User's account status to Disabled.









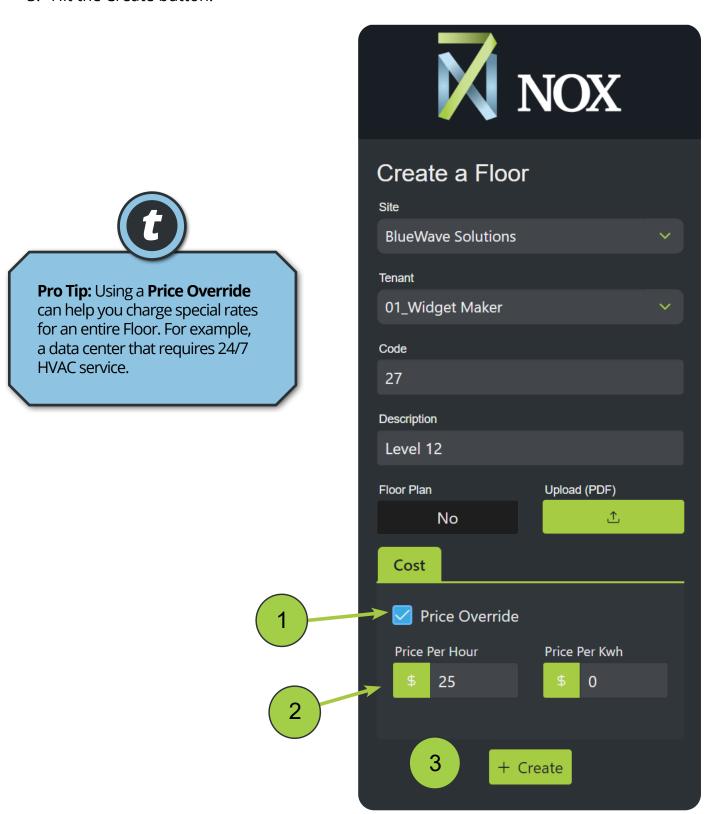
# Floor Manager

Location: Main Menu > Settings > Floor Manager

Floors are the designated floors, areas, and zones Tenants lease in your site. Use the Floor Manager to create new floors, add price overrides, and upload floor plans.

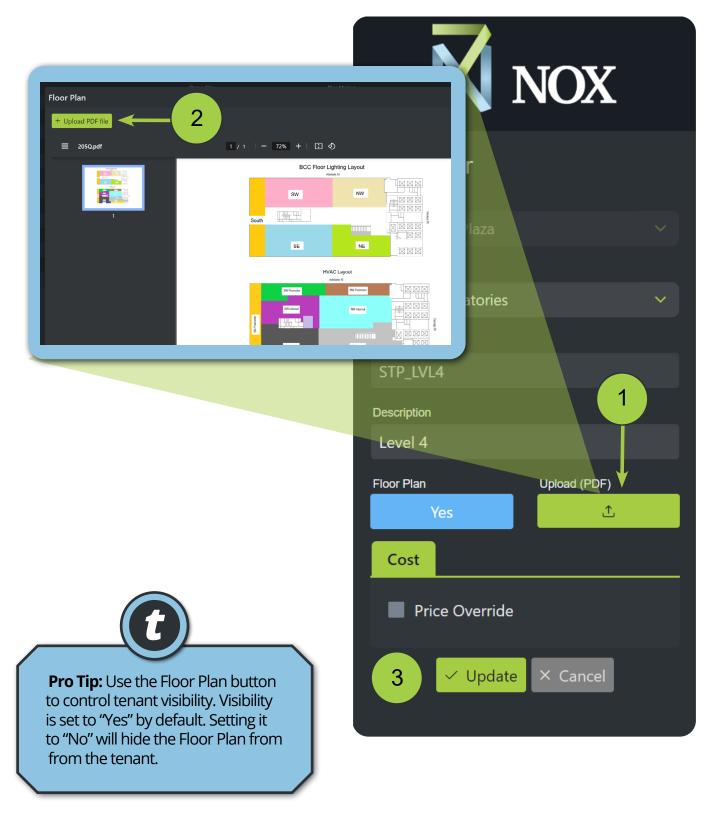


- 1. Tick the Price Override box
- 2. Enter a Price Per Hour or Price Per kWh
- 3. Hit the Create button.



Adding a Floor Plan provides tenants a handy map of zones when making their bookings.

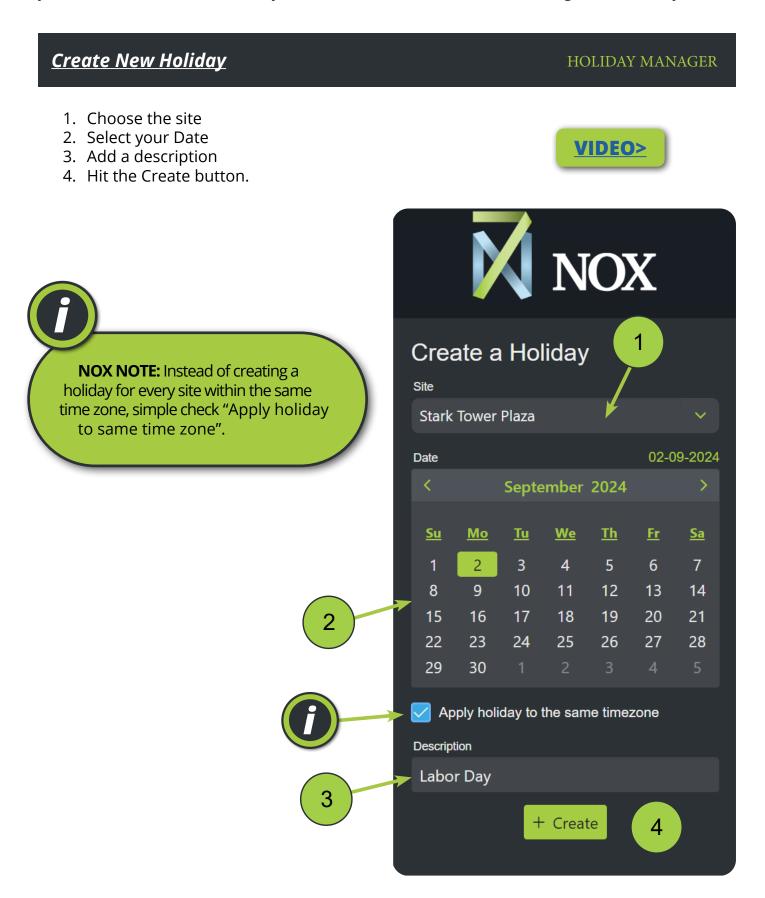
- 1. Click the Upload PDF button (pop-up will appear)
- 2. Upload a PDF file
- 3. Hit the Create/Update button



## Holiday Manager

Location: Main Menu > Settings > Holiday Manager

The Holiday Manager is where you can add public holidays (e.g., Labor Day) that run during your normal business hours/days. Tenants will be able to make bookings on those days.



## **Energy Manager**

Location: Main Menu > Settings > Energy Manager

If you're charging tenants a **Price per kWh instead** of a **Price Per Hour**, you can manage your energy points and rates in the Energy Manager.

### **Create New Energy Point**

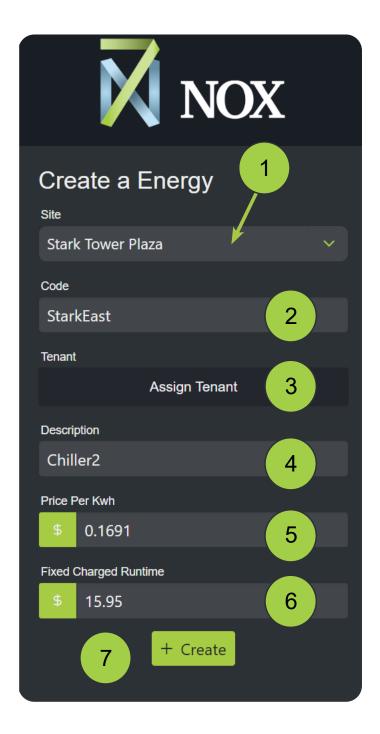
ENERGY MANAGER

- 1. Choose the site
- 2. Create a Code or Point Name
- 3. Assign the Tenant
- 4. Add a description
- 5. Add a Price per kWh
- 6. Add a Fixed Charged Runtime
- 7. Hit the Create button.

Each Energy Point is assigned to a specific zone, level or piece of building equipment (ex. chiller) in your property.

The 7NOX system reads the exact energy consumed, then uses your Price per kWh and any fixed charges to calculate the total after-hours charges for your tenants.





## **Creating Reports**

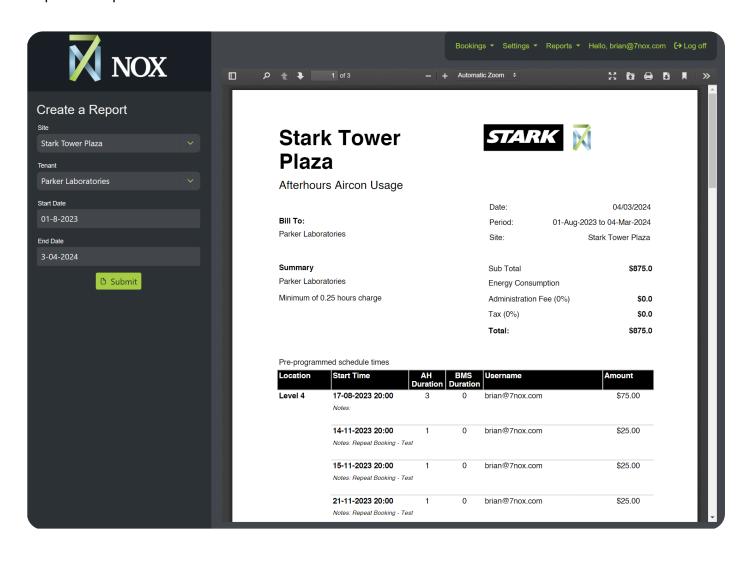
Location: Main Menu > Reports > Report

Reports are intended as proper tenant invoices for after-hours HVAC charges and are automatically emailed to managers each month at PDFS. However, you can create a report at any time.

Within reports, you can view the dates and times of individual bookings along with the users who made them. Reports are also customizable. You can add your own company logo, so tenants can be reassured they're getting utility invoicing from you.



Reports list each booking, taxes, fees, and total costs for the selected date range. You can export a Report as a PDF.



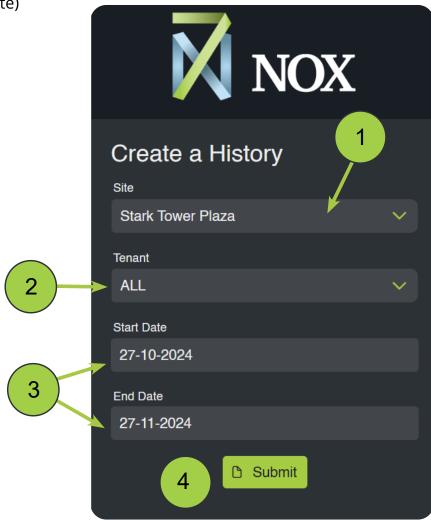


## **Generating Histories**

Location: Main Menu > Reports > History

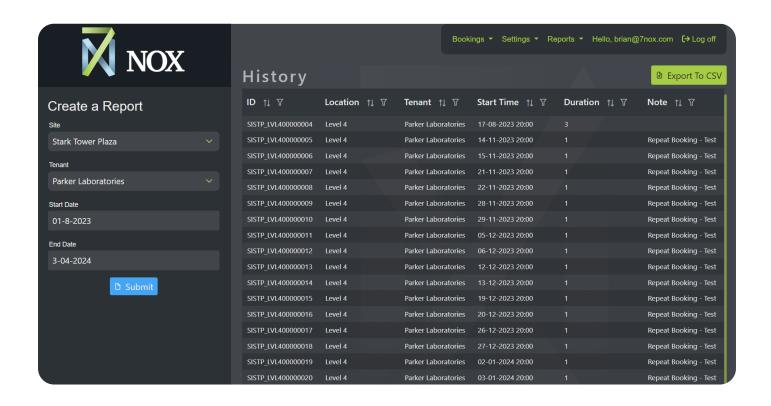
Histories exist as spreadsheets and are intended for higher level data analysis. You can manually run a history at any time, either for a tenant or an entire site. Histories make it easy to report on after-hours usage for energy ratings systems such as LEED or neighbors. The history will list booking IDs, location, tenant, start time, duration and any notes. You can use column filters to further narrow your search results

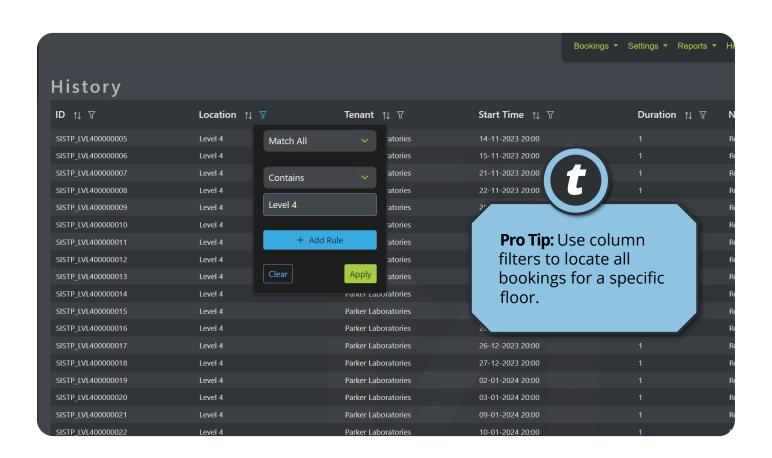
- 1. Select the site
- 2. Chose a Tenant (or "All" for site)
- 3. Set a Start and End Date
- 4. Hit the Submit button.



**Pro Tip:** Generating Histories can be a handy source for energy rating programs like NABERS that require overtime hours be recorded separately from normal business hours.

After generating your History report, further refine the results using column filters. Export the filtered list as a CSV file.





## Site Summaries & Custom Email Reports

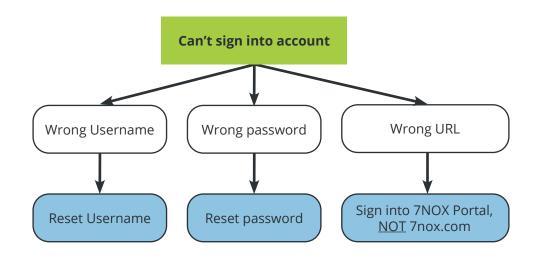
You also have access to two other types of reports: Site Summaries and Custom Emails.

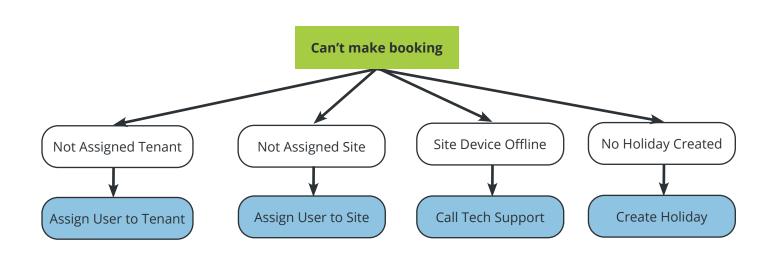
**Site Summaries** contain total after-hours usage and costs *broken down by tenant for an entire site* (see below). These reports give you a high-level glance at your site as a whole, or to quickly identify heavy after-hours users, from occasional users.

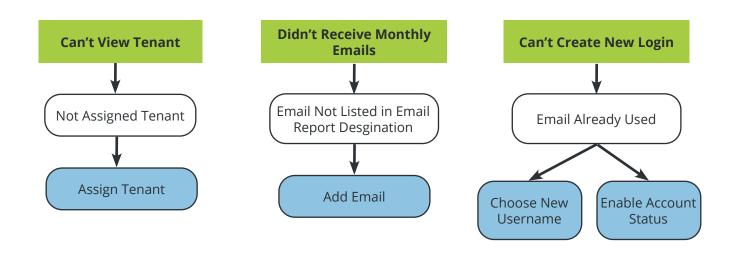
**Custom Email Reports** are a combination of tenant reports and site summaries. You can generate these reports at any time and email to anyone you wish. **Note:** these are not automated reports, rather, they are generated as one-offs that contain invoices for all tenants along with a single site summary. Every email entered into the email field will receive a custom email report. Remember to separate each email address with a semicolon.



# Troubleshooting Chart (Desktop)







## **Document Revisions**

This document is version controlled via the use of revision numbers. The revision numbers will be incremented each time the document is changed. A minor revision will be indicated by a change to the number to the right of the point, such as from 1.1 to 1.2. Normally the document will only be formally re-distributed when the major version changes, indicated by a change in the number to the left of the point, such as from 1.2 to 2.0.

Revision	Date	Ву	Comments
1	19/01/2018	OpSys Solution Ltd	Release
1.1	13/10/2021	OpSys Solution Ltd	2.5 Updates
1.2	27/02/2022	OpSys Solution Ltd	Interface Updates
1.3	10/05/2023	OpSys Solutions Ltd	3.0 Interface Updates
2.0	11/03/2024	OpSys Solutions Ltd	v3.0.20 Updates
2.1	27/11/2024	OpSys Solutions Ltd	v3.2.1



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