M3CENTRAL

USER GUIDE

Version 3.0

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M3 HOUSING
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M3Central User Guide

Overview of M3Central

M3Central is a web-based system with two modes. The Diagnostics mode gives non-technical staff at housing providers the ability to diagnose repairs and accurately allocate Schedule of Rates items. The Reporting mode gives tenants the ability to report repairs online. You can subscribe to both modes, or just to one.

M3Surveyor is an optional add-on for the Diagnostics mode that works offline. It is primarily used for void property surveys, but can also be used to create a schedule of works for any purpose.

M3Central is designed to be portable across multiple devices, including mobiles and tablets. This enables on-site diagnosis of repairs. The system is highly customisable to ensure each organisation can tailor the content to their specific requirements.

Visit the M3 website to try out M3Central and view a video demo:

https://www.m3h.co.uk/try/m3central

This user guide is intended for use by M3Central administrators, and staff who use M3Central Diagnostics and M3Surveyor. It is not intended for use by tenants who use M3Central Reporting, although the instructions in the Reporting a repair section could be adapted for tenants.

Administering the system

Administrators can manage and customise M3Central via the Control Panel. You can use it to change settings such as the default Schedule of Rates, and to set up email addresses and URLs to get data in and out of the system.

The Control Panel also includes an online editor which can be used to customise available resources including, but not restricted to, the repair problems, the advice, and the Schedule of Rates. You will be able to test all changes before making them available to your users.

M3Central Reporting subscribers can use the Control Panel to view and export system usage reports.

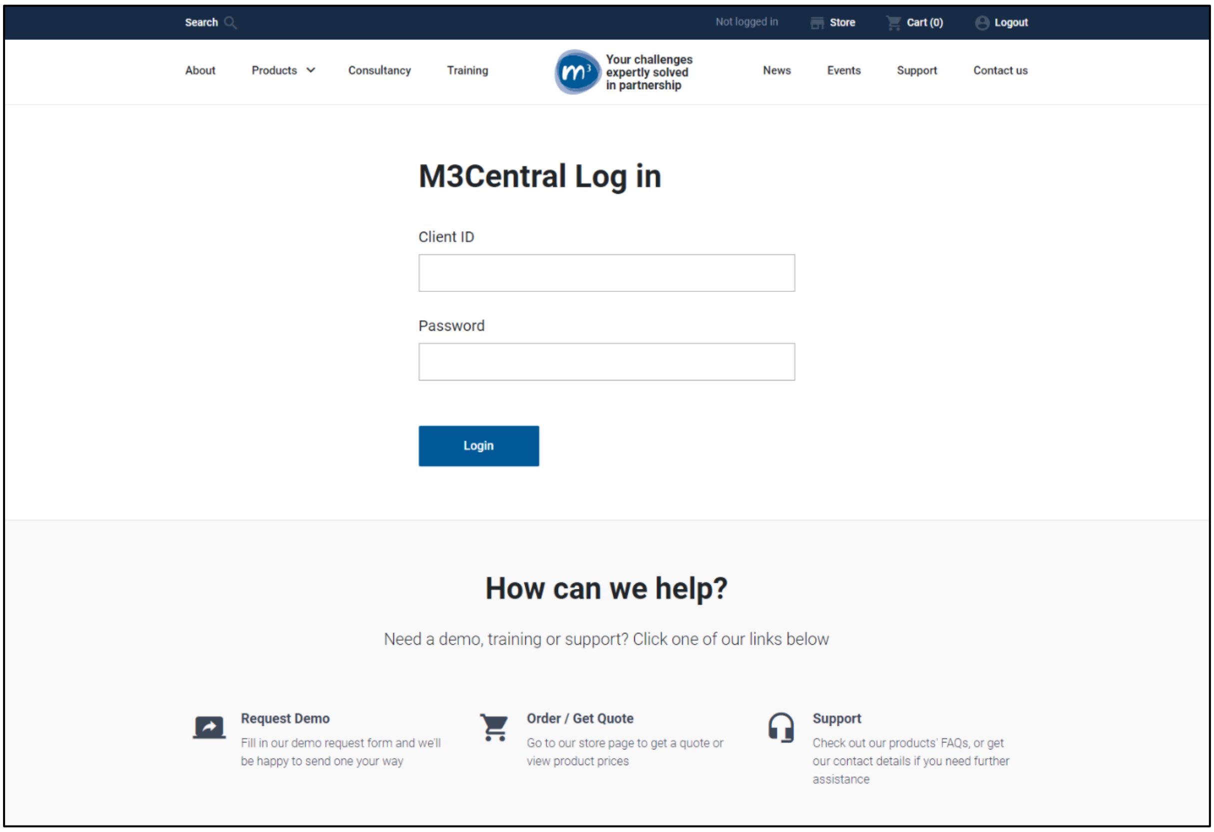
Accessing the Control Panel

You can access the Control Panel via the following link:

https://m3central.net/facmin/index.cfm

You will be prompted for your login ID and password. These details would have been emailed to the person nominated as your organisations primary contact when M3Central was activated. You can retrieve your login details by emailing helpdesk@m3h.co.uk.

When requesting login details, remember to send the request from an official organisation email (I.E. not from a personal Gmail or Yahoo account).



Settings

Repair Mode (at the top of the page) indicates which mode of M3Central you are subscribed to. This will affect which settings options are available. M3 Central has two modes: Diagnostics and Reporting. Diagnostics mode is intended for staff who need access to the Schedule of Rates. Reporting mode is intended mainly for use by tenants who want to report repair problems online. An M3Central subscription may cover you to use each mode individually or together.

This table below explains each of the options available on the settings page. Please note, you can also select the information link next to each option for detailed explanations.

Option	Applicable mode	Explanation
Show quantities option	Reporting	Check this option to allow users to set a quantity next to each repair item. Quantities can only be set when the unit of measurement for the underlying Schedule of Rates item is IT or NO.
Display location option	Reporting	Check this option to allow tenants to specify a location of a repair from a predefined list. This list can be customised from within the Editor.
Default email address	Reporting	This is the default email address to which repair reports will be sent. It can be overridden by using the **Setmail addresses** option (explained below) or by setting redirection codes for specific repair problems. If it finds any alternative email address is not valid, M3 Central Reporting will revert to the default email address.
Send report from user address	Reporting	Check this option to set the user's email address as the 'from' address in an emailed report. This lets you use an auto-responder on your mailbox to acknowledge receipt of the repair report.
Store user details in report database	Reporting	Check this option to store the user's name, address and other information they provide in the personal details form. By default, M3Central does not keep this information.
Store user comments	Reporting	Check this option to store user comments in the M3Central database.

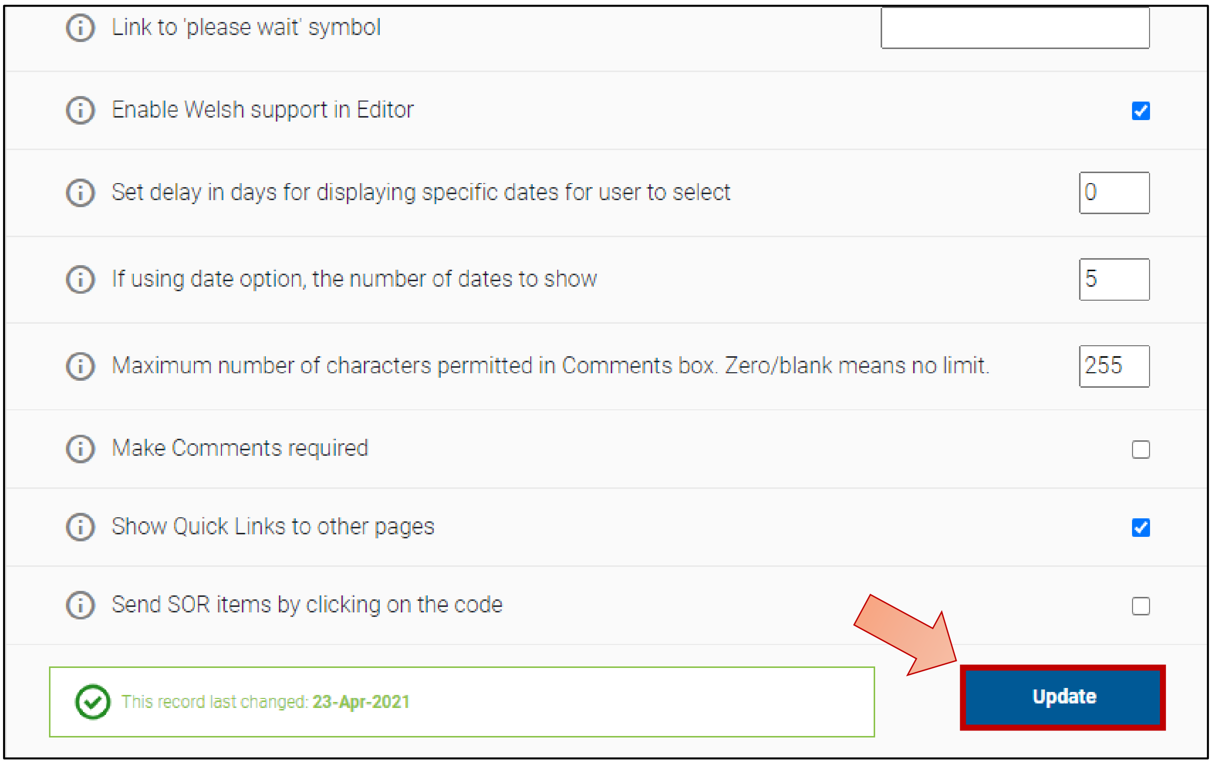
Option	Applicable mode	Explanation
Opt out of Google Analytics	Both	Check this option to prevent your data from being used by Google Analytics. M3Central uses Google analytics to obtain useful metrics which are used to improve the user experience and functionality. By default, this option is not checked.
Return SOR Codes	Reporting	Check this option to return suggested SOR item codes with the repair reports.
Default Schedule of Rates for Diagnostics	Diagnostics	This lets you set the Schedule of Rates that is used for Diagnostics.
Default Schedule of Rates for Reporting	Reporting	This lets you set the Schedule of Rates that is used for Reporting. This option only affects the SOR item codes that are returned with a repair report. If you have elected to have no SOR item codes returned with repair reports then this option is irrelevant.
Configure for use with Open Access from Capita	Reporting	These portals have some specific requirements for M3 Central Reporting to work with them. For more information on integration refer to the *M3Central Integration Guide*.
Configure for use with the Self Service Portal from Orchard	Reporting	These portals have some specific requirements for M3 Central Reporting to work with them. For more information on integration refer to the *M3Central Integration Guide*.
Allow users to upload photos	Reporting	Check this option to allow users to attach photos to their reports. The photos are kept on the M3 Central server and a link to them is sent with the report.
Allow photo captions	Reporting	Check this option to allow users to add a caption to uploaded photos.
Extra photo security	Reporting	Check this option to increase security of any new photos uploaded by users. Photos will be saved in a secure folder, which can only be accessed using API credentials. If unchecked, photos saved using extra security will still only be accessible using API credentials. For more information on how to retrieve secure photos refer to the *M3Central Integration Guide*.

Option	Applicable mode	Explanation
Permit only specified setmails	Reporting	Check this option to only permit setmail addresses that are specified below. Setmails are email addresses that are passed to M3Central when it is started up. They allow customers who have a group structure to send reports to different mailboxes while using the same M3 Central account. Do not use this option if you are using redirection by postcode (in that case your email addresses are already specified separately).
Display lookup option on home page	Both	Check this option to display the Lookup field on the M3Central home page. It allows users to enter a search term and get an immediate list of matching options as they type.
Display report reference number to user	Reporting	Check this option to hide the report reference number from the user. This number is useful for tracking the status of individual reports. You may want to hide it to prevent tenants from confusing this with the job order number.
% Percentage change to SOR rates	Diagnostics	Apply a % discount or uplift to all the rates in the Schedule of Rates. Apply a discount by entering a negative value, and an uplift by entering a positive value.
Clear all items from the Scheduler after they have been successfully sent	Diagnostics	Check this option to clear the Scheduler after items have been sent.
Allow users to make free text reports	Reporting	Check this option to allow tenants to make type in a description of their repair problem. This is usual if they want to add additional comments, or if they cannot find the repair they want to report.
Link to 'please wait' symbol	Both	This lets you provide a link to your own image to replace the standard ‘please wait’ image. You must ensure that the link is externally resolvable and contains all the required resources.
Enable Welsh support in Editor	Reporting	Check this option to display the Welsh language resources in the Editor. This allows you to edit these sections and to keep them aligned with the English versions.

Option	Applicable mode	Explanation
Set delay in days for displaying specific dates for user to select	Reporting	Inserting a value greater than 0 here will cause users to be presented with a list of actual dates when asked for access information. M3Central will use the number you enter to calculate how far in the future to start offering dates. A 2-day delay is built in. So, if 1 is entered the first date will be 3 days in the future. Weekends are not included so 10 days means 2 weeks. M3Central will exclude bank holidays. The system also adjusts to the time of day. If the current time is 17.00 hours or later, the starting date will be calculated from the following day. If 0 is entered, users are presented with days of the week with AM/PM/Evening slots. M3Central is not integrated with any appointment system. It just passes back the dates chosen by the user.
If using date option, the number of dates to show	Reporting	If you have activated the option to set dates for users to select, you can insert a value here for the number of dates to display. The default is 5.
Maximum number of characters permitted in Comments box.	Reporting	If user comments are being stored in a database that you control it may have limits on the number of characters that can be stored. You can set the maximum number of characters that users can enter here Characters include spaces. Users get a counter showing them how many characters they have left. A blank or zero entry means no restrictions on the number of characters that can be entered.
Make comments required	Reporting	This refers to the Comments box available when users are making a report. This option will mean that users have to make an entry in this box (which can be a single space) before they can make their repair requests.

Option	Applicable mode	Explanation
Show Quick Links to other pages	Diagnostics	The Quick Links for Diagnostics appear next to the pictures and allow users to jump directly to pages that may be relevant to the problem that they want to diagnose There is an equivalent set of links for Reporting, but these only appear when the user clicks on the 'Can't find the problem you want to report?' link. They are not affected by this setting. Quick Links can be amended in the Control Panel Editor.
Send SOR items by clicking on the code	Diagnostics	Allows users to click on the SOR item code to immediately send that item without putting it in the Scheduler first.
Units of Measure that should allow quantities with decimals	Diagnostics	This allows you to define which Units of Measure (UOM) should allow for quantities entered with decimals. By default, quantities are rounded to nearest whole number. The M3NHF Schedule of Rates Measurement Rules states that items with UOMs of LM, SM or CM should be measured to 2 decimal places, so this allows for that at the point of diagnostics. UOMs should be separated by a comma. For example, to allow quantities to be marked in decimals for items with UOMs of LM and SM, enter **LM,SM**

Please note, any changes you make to settings will not be saved unless you select the **update** button.



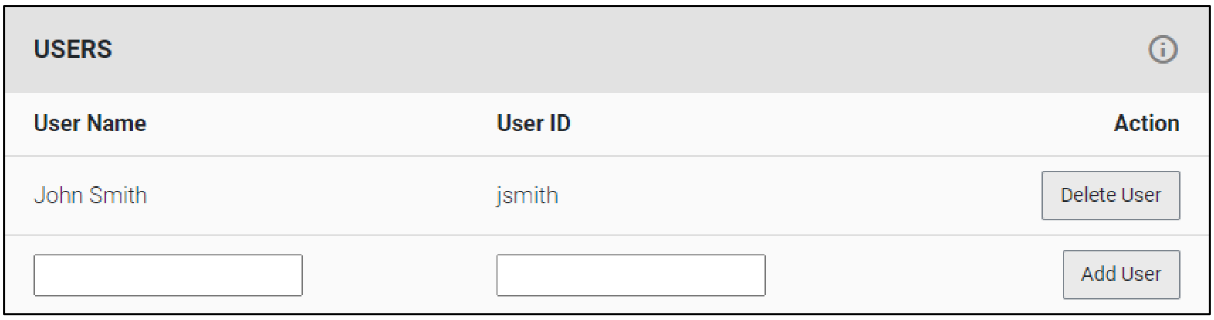
Adding or removing users (Diagnostics mode)

Under the **Users** section you can add a user by entering a **User Name** and **User ID** and selecting the **Add User** button. The User ID should contain no spaces. To delete a user, select the **Delete User** button.

Users may be asked for their User ID when they want to save a list of Schedule of Rates items from the Scheduler. These files can be opened from within M3Central and M3Locator Plus (version 4.4 and higher).

The user will be prompted for their User ID when they try to save or open a file in the Scheduler. To preload the User ID you would need to add the parameter **user=** to the URL:

https://m3central.net/index.cfm?&ID=514884&user=jsmith

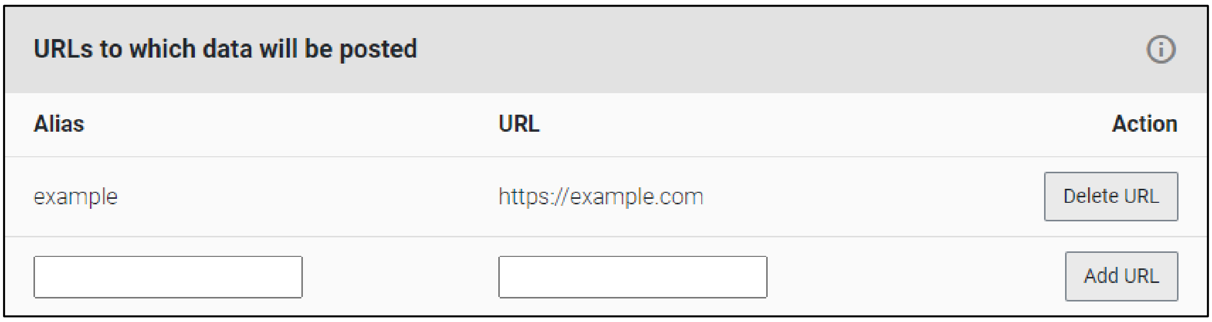


Defining the URL where data will be posted

Under the **URLs to which data will be posted** section you can create a **returnurl**. The returnurl defines the URL where M3Central will send reports or items when it is integrated with another system.

To create a returnurl enter an **Alias** and **URL** and select the **Add URL** button. To delete a returnurl select the **Delete URL** button.

Refer to the *M3Central Integration Guide* for more information on how to use the returnurl.



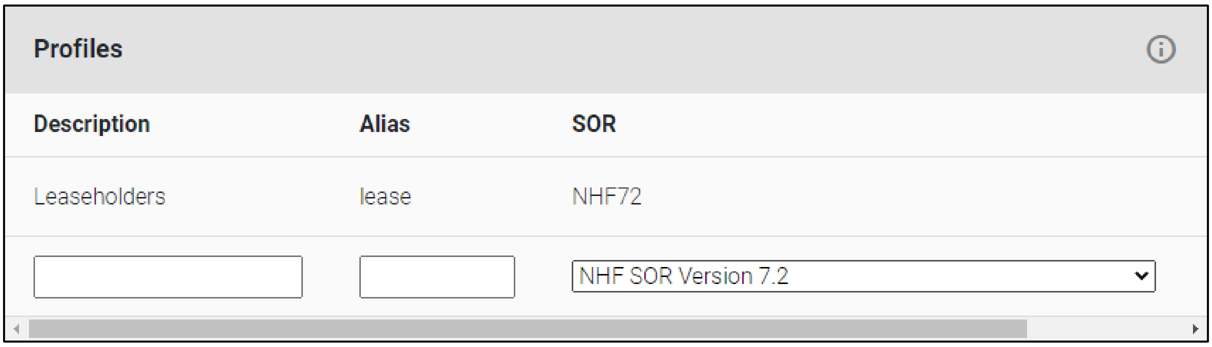
Defining additional email addresses

Under the **Setmail addresses** section you can define email addresses where reports will be sent. If you have checked the **Permit only specified setmails** setting, only email addresses defined in this section can override the default email address. The redirection code assigned to the email address can also be used to route repair reports according to the type of repair. Refer to the Editing Repair Problems section for more information on routing repair reports using a redirection code.

To add a setmail address enter an email address under **Emails** and an optional **Redirection code** and select the **Add Email Address** button. To delete a setmail address select the **Delete Email Address** button.

Adding or removing profiles

Under the **Profiles** section you can create different profiles for different target groups. For example, you may want to create a profile for leaseholders that only displays the repairs relevant to that group. To add a profile, enter a **Description**, **Alias,** and **SOR** and select the **Add profile** button. The Alias should contain no spaces. The SOR specifies the Schedule of Rates version. To delete a profile, select the **Delete Profile** button.



Once you have created a profile you can load it in the Editor and configure it to meet your requirements. Refer to the Using the Editor section for more information on how to select and edit a profile.

You can invoke a profile by adding the appropriate parameter to the M3Central URL. To load a profile with the alias 'lease', you would need to add the parameters **profile=lease** to the URL:

https://m3central.net/index.cfm?&ID=514884&returnurl=example&profile=lease

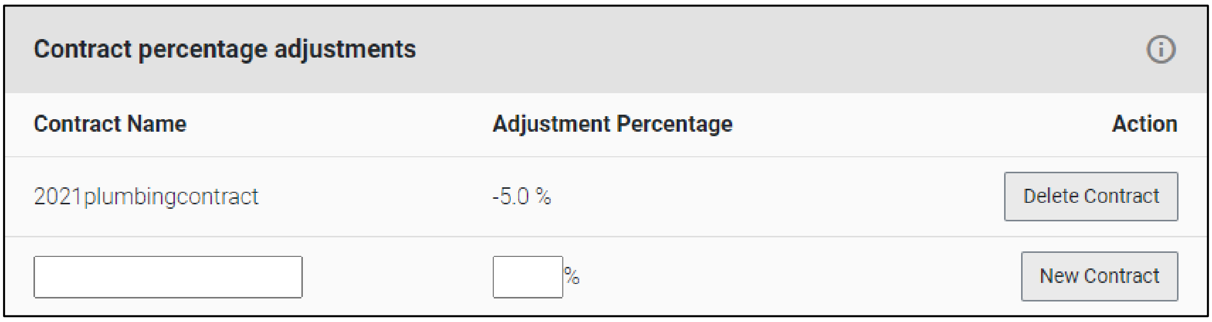
Profiles are primarily intended for use in Reporting mode, but can also be used in Diagnostics mode.

Contract percentage adjustments

Under the **Contract percentage adjustments** section, you can set uplifts or discounts to the standard rates in the M3NHF Schedule of Rates for different contracts. To add a contract, enter a **Contract Name** and **Adjustment Percentage** and select the **New Contract** button. To delete a contract, select the **Delete Contract** button. The contract name should contain no spaces. You do not need to enter the percentage sign. To apply a discount enter a negative number.

To load the percentage adjustments for the relevant contract, you would need to add the parameters **contract=** to the URL:

https://m3central.net/index.cfm?&ID=514884&contract=2021plumbingcontract

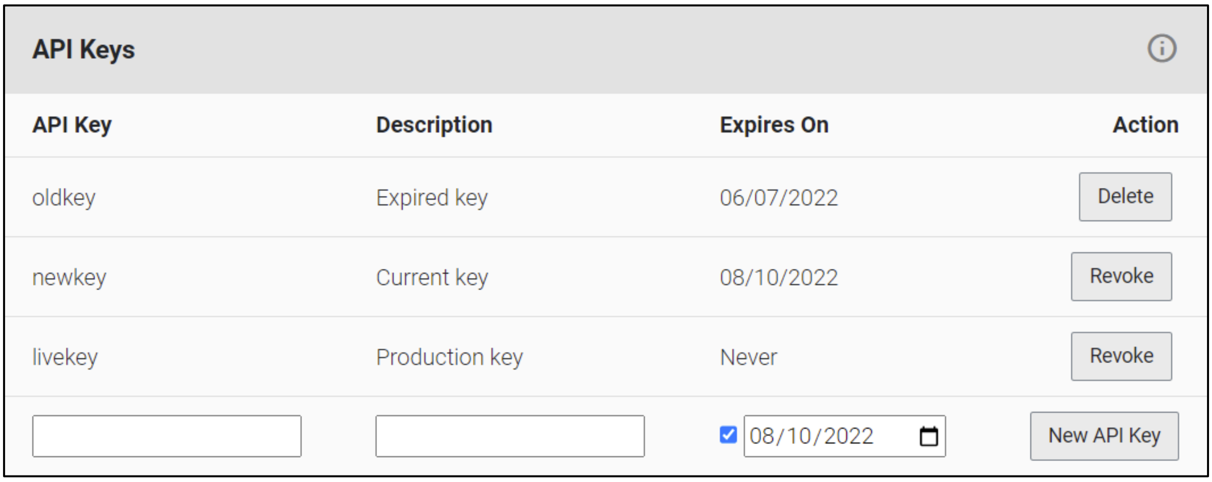


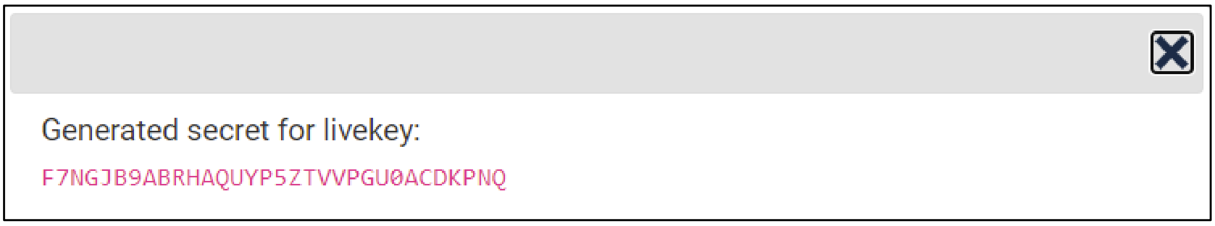
API keys for accessing secure photos

Under the **API Keys** section, you can create API Keys to access secure photos. Photos are saved in a secure folder and only accessible using API keys if the **Extra photo security** option has been checked in Settings. To add an API key, enter an **API Key** name, **Description** and **Expires On** date and select the **New API Key** button. The **API Key** name must be unique for the account. If the fields are valid, a pop-up window will appear showing an automatically generated secret key. This is the only time the secret key will be displayed and there is no way to retrieve it later.

To deactivate an active API key, select the **Revoke** button. To delete an expired or revoked API key, select the **Delete** button.

For more information on how to retrieve secure photos refer to the *M3Central Integration Guide*.

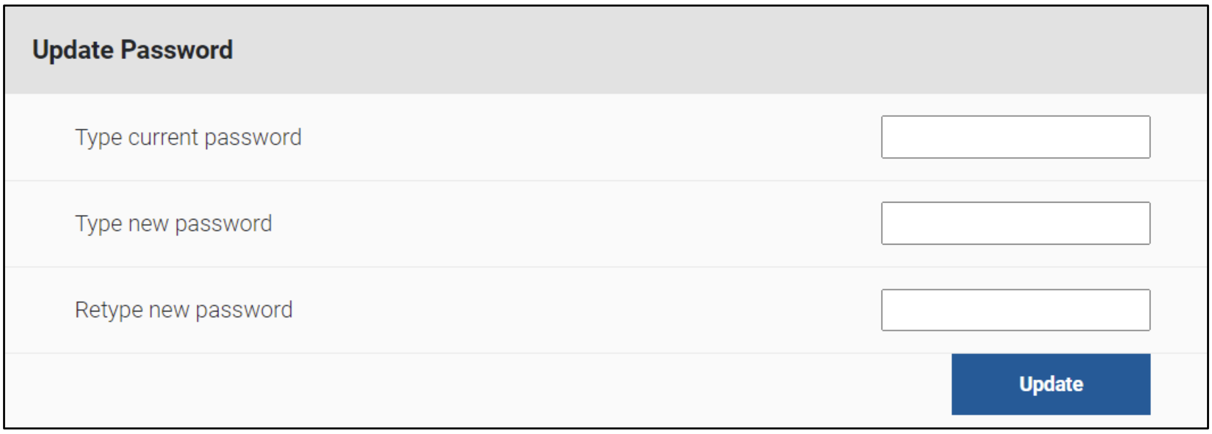




Updating the Control Panel password

Under the **Update Password** section, you can change the password for the Control Panel. To change the password, enter your new password twice and select the **Update** button.

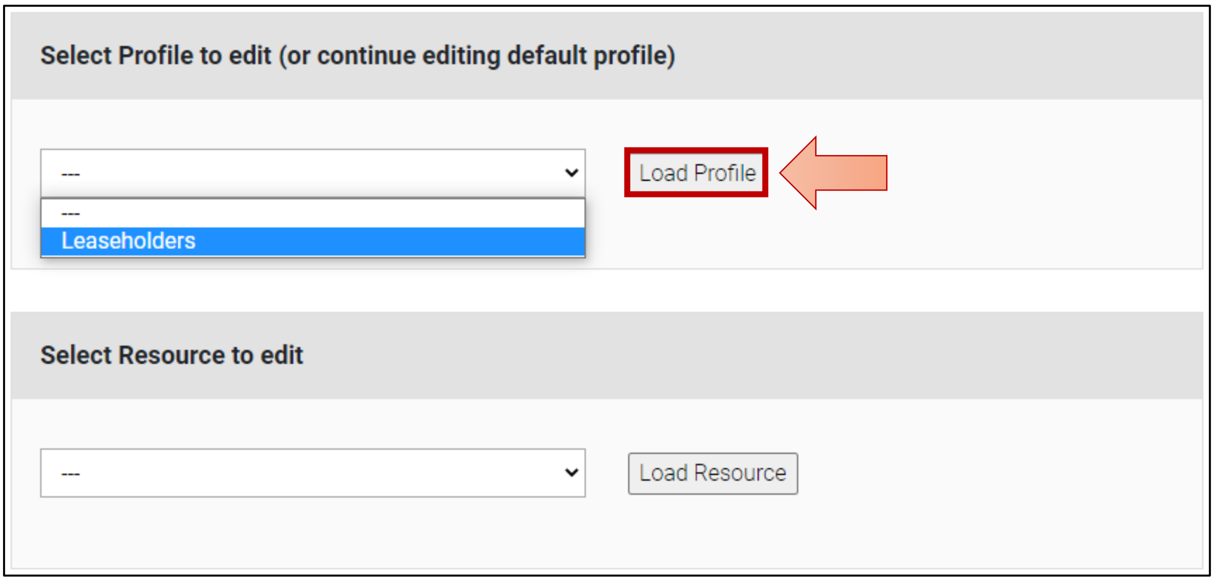
Refer to the Accessing the Control Panel section for more information on how to retrieve your login details if you forget your password.



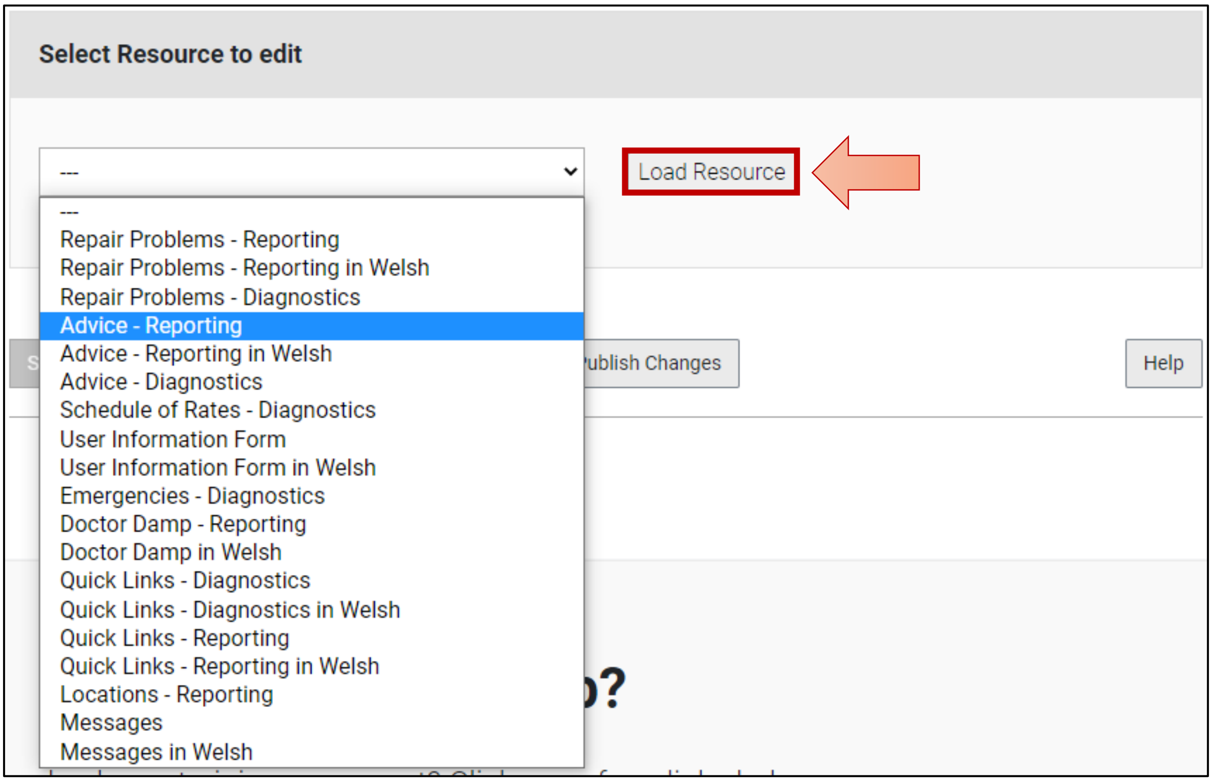
Using the Editor

The Editor can be used to customise the resources in M3Central to your organisation's specific requirements. This includes, but is not limited to, the repair problems, the advice, and the Schedule of Rates. The Editor is accessed via the Control Panel.

To begin using the Editor choose a profile from the drop-down list under the **Select Profile to edit** section, and select the **Load Profile** button. Choose **---** to load the default profile. If you have not created any profiles, you do not need to load a profile. Refer to the Adding or removing profiles section for more information on adding or removing profiles.



To load the resource you want to edit, choose a resource from the drop-down list under the **Select Resource to edit** section, and select the **Load Resource** button.



Saving, previewing and publishing changes in the Editor

The Editor lets you test all changes before making them available to your users.

Saving changes to the test area

Selecting the **Save Changes** button will save changes to the test area. End users will not see the changes. If the button is greyed out no changes have been made.

Previewing changes

Selecting the **Preview Changes** button will load an instance of M3Central from the test area so you can preview changes.

Cancelling changes

Selecting the **Cancel Changes** button will remove all data from the test area. Cancelled changes cannot be recovered.

Publish changes for end users

Selecting the **Publish Changes** button moves changes to the live area where they will be seen by end users.

Editing Advice

Advice is context sensitive and changes depending on the repair category you have selected in the M3Central interface. Refer to the Using the system section for more information on using advice when reporting or diagnosing a repair.

There are three resources for advice: one for Diagnostics mode, one for Reporting mode and one for the Welsh language Reporting mode. It is up to you to ensure that the English and Welsh advice resources are synchronised. The Welsh language resources will not appear if you have not checked the **Enable Welsh support in Editor** option in settings.

To edit advice, first load the relevant advice resource by choosing it from the drop-down list and selecting the **Load Resource** button. Next select the category of the advice you want to edit.

Editing the text

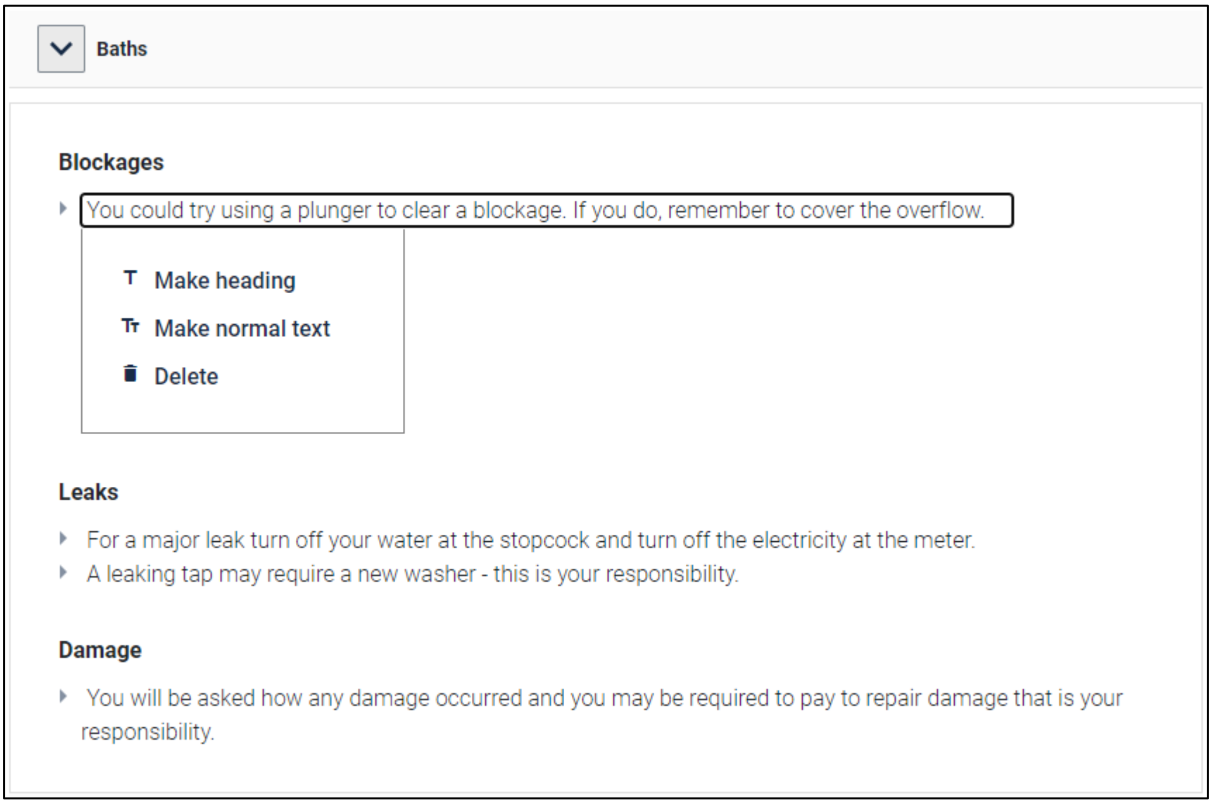
To edit advice, left click anywhere in the advice text box. If you hit the **Enter** key a new bullet point will be created on the next line.

To make highlighted text bold hit **Ctrl + B** (Windows)/**Cmd + B** (Mac OS) on your keyboard. To underline highlighted text hit **Ctrl + U** (Windows)/**Cmd + U** (Mac OS). To make highlighted text italic hit **Ctrl + I** (Windows)/**Cmd + I** (Mac OS).

You can toggle between making text a heading or normal by select **Make heading** or **Make normal text** in the popup box. You can delete a line of text by selecting **Delete**.

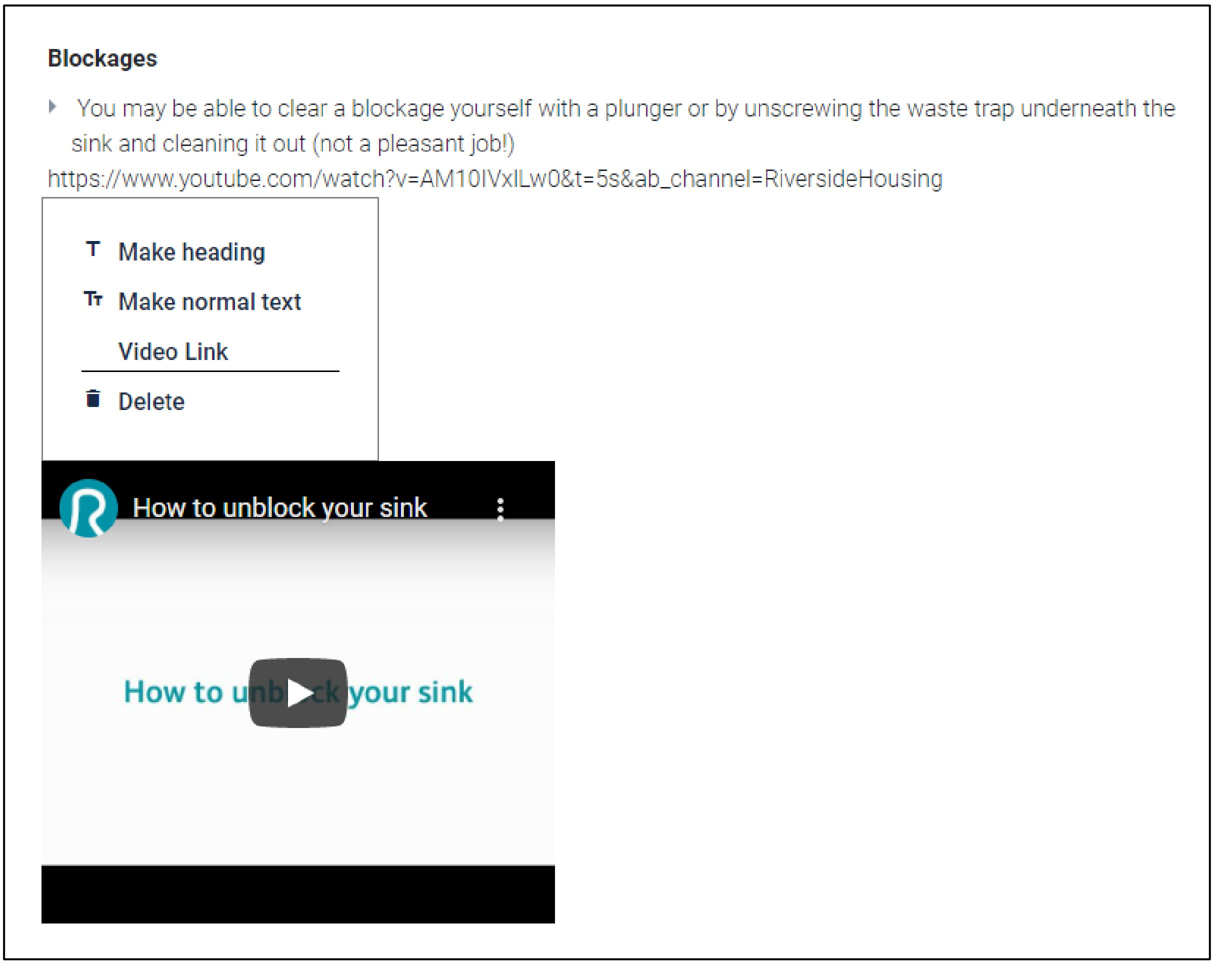
To create a hyperlink, left click and drag your mouse cursor over text. An **Edit, edit or remove a link** popup will appear.

Remember to select the **Save Changes** button or your changes will be lost.



Imbed a YouTube video

To imbed a YouTube video in advice, paste the web address of a video in the text. Now left click on the web address and select **Video Link**.



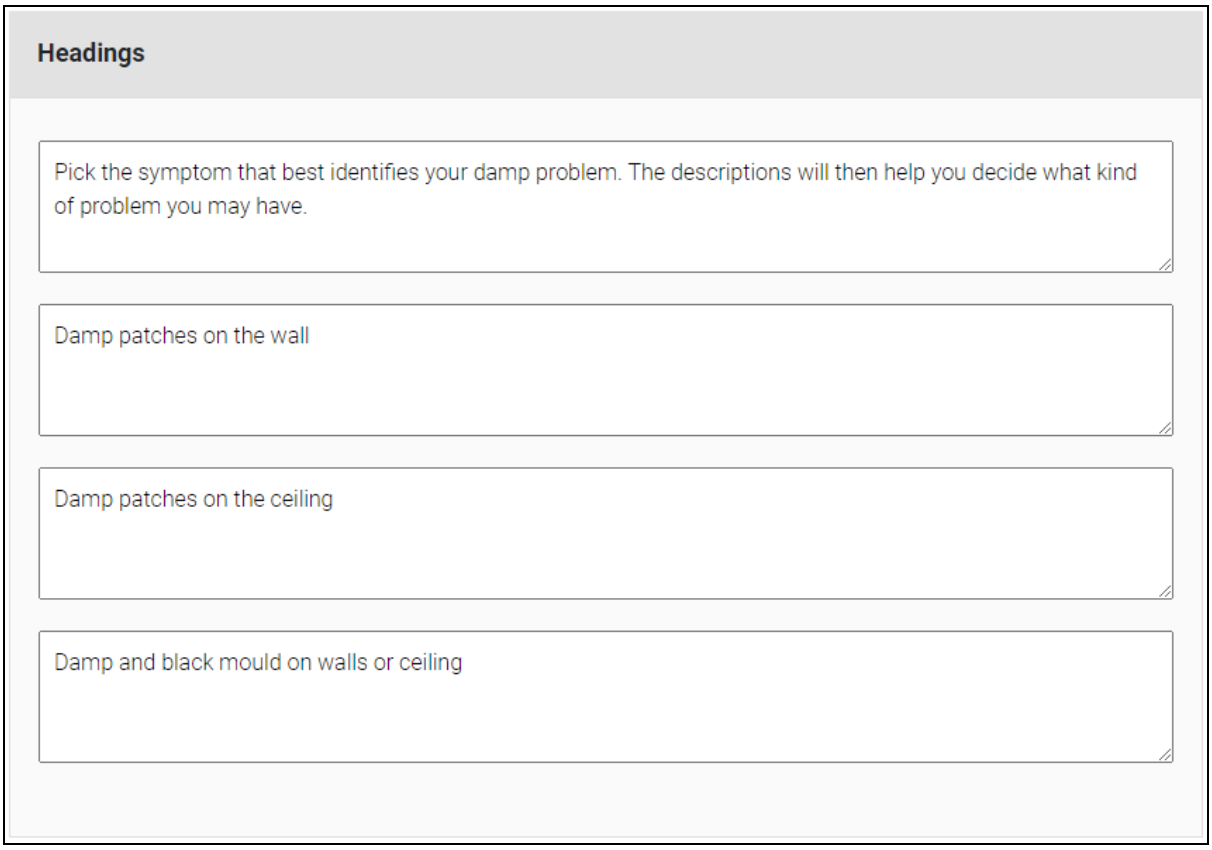
Editing Doctor Damp

Doctor Damp provides a simple approach to report or assess a damp problem. It is intended to narrow down possible causes of damp. It is not intended as a substitute for inspections by technically qualified staff. Doctor Damp works by taking the user through a series of options. For all options there is some general advice, and in some cases there is a link to a specific repair solution.

There are three resources for Doctor Damp: one for Diagnostics mode, one for Reporting mode and one for the Welsh language Reporting mode. It is up to you to ensure that the English and Welsh resources are synchronised. The Welsh language resources will not appear if you have not checked the **Enable Welsh support in Editor** option in settings.

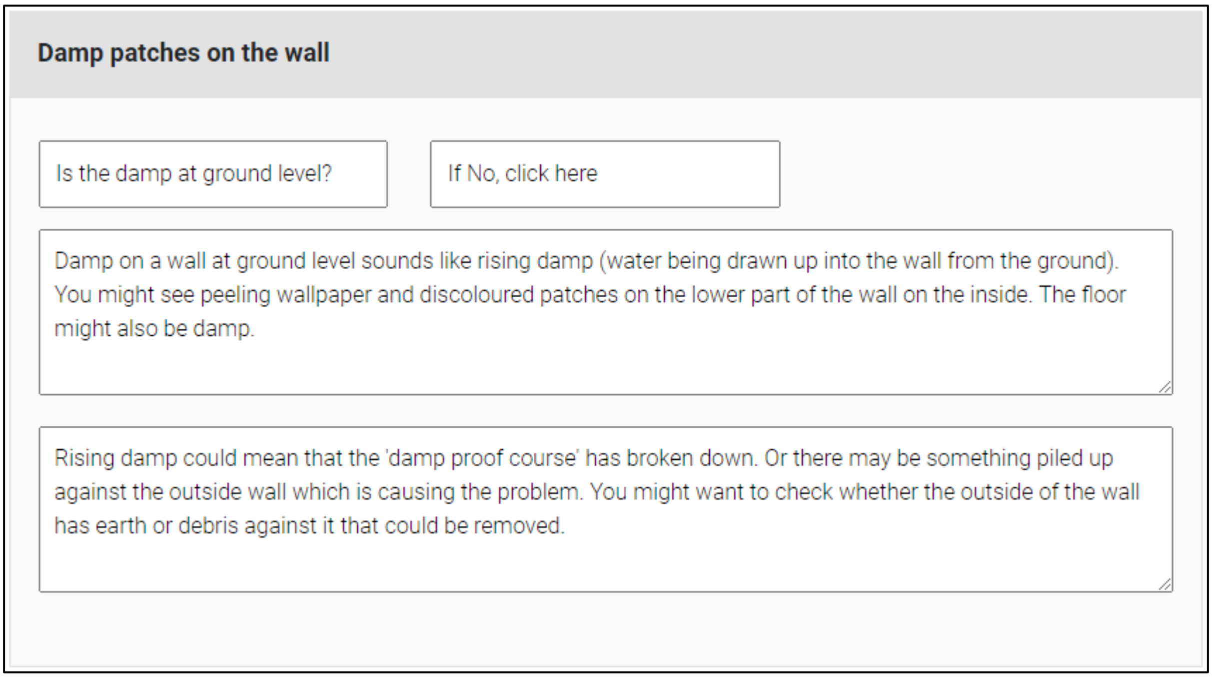
Editing the headings

You can edit the text for the headings under the **Headings** section. There is a maximum of three headings. Changing the text will change the headings in the M3Central interface, but the sections corresponding to each heading in the Editor will remain **Damp patches on the wall**, **Damp patches on the ceiling** and **Damp and black mould on walls or ceiling**.



Editing the options and general advice

You can edit the general advice under the options by scrolling down to the relevant heading. Each heading has three phases of advice. For example, if a user selects **Damp patches on the wall** they will be asked whether the damp is at ground level and be given some general advice (both are editable). If they select **No** to the question, they advance to the next phase and are asked if the damp patch is below a window. If they select **No,** they advance to the final phase and are presented with a suggested repair category.



At any point during the process, the user can enter some free text (optional) and select **Make Report** to report a damp problem.

Editing Emergencies (Diagnostics mode)

Emergencies is intended to show a list of urgent repair problems that require immediate action. Under each of these problems you can list Schedule of Rates items that may be relevant to the problem. Refer to the Editing Repair Problems section for more information on how to show or hide Emergencies in the M3Central interface.

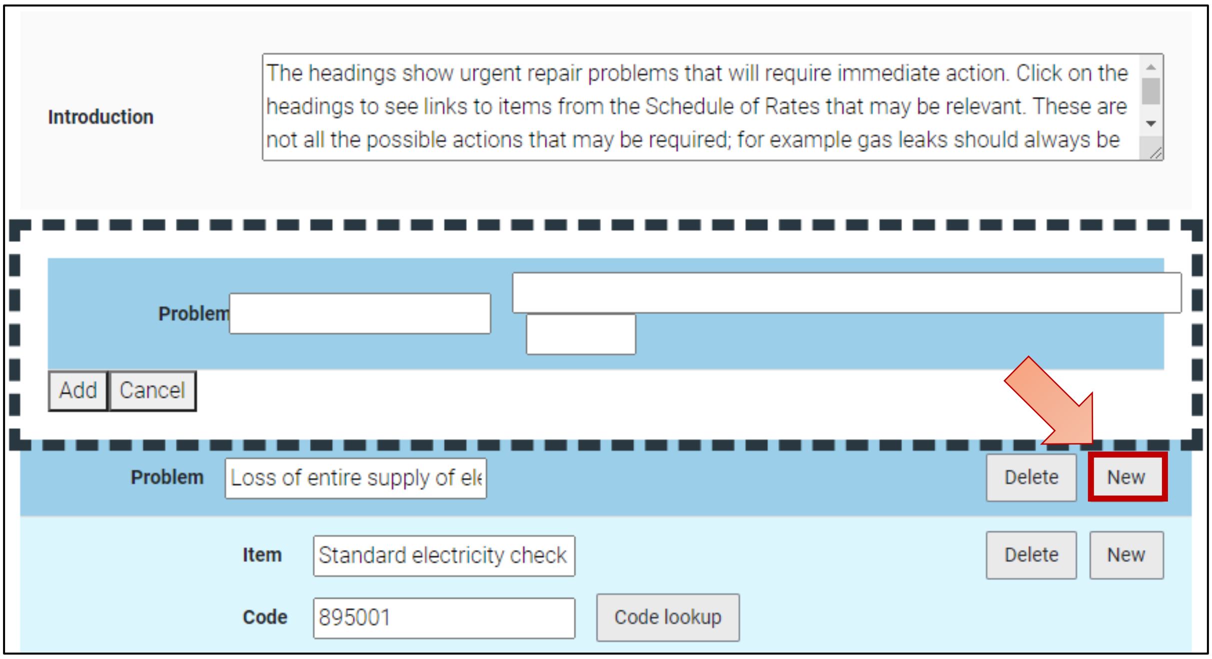
Under the **Introduction** section you can edit the introductory paragraph that appears when a user selects Emergencies.

Editing the urgent repair problem

Scroll down and select the relevant text box to edit an urgent repair problem.

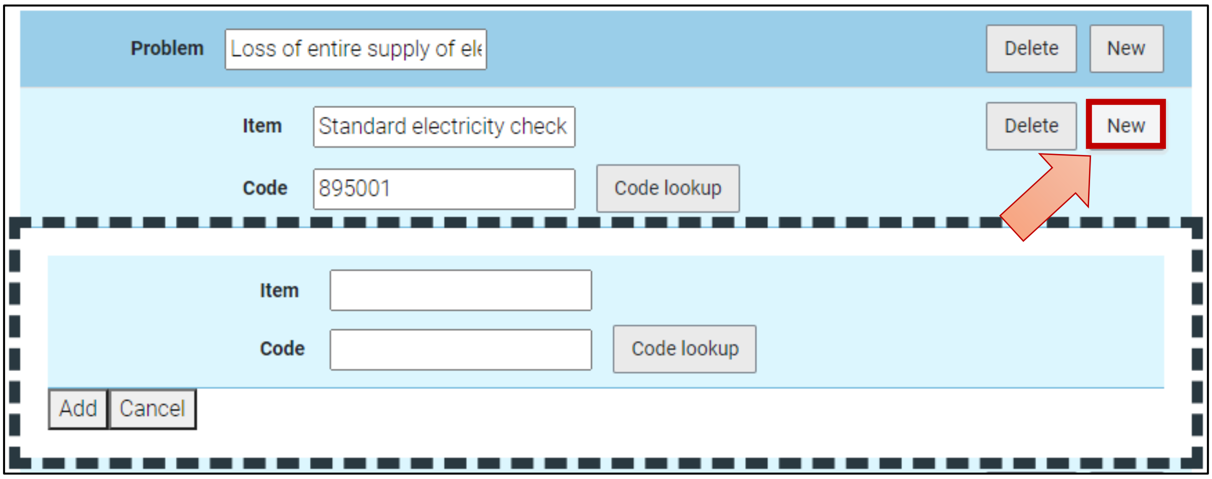
To add a new problem select **New**, and you will be prompted to enter text for the urgent repair problem (left), text for the solution to the problem (top right) and the Schedule of Rates item code (bottom right). You can select the **Code lookup** button to search for the relevant code. Select the **Add** button to add the new urgent repair problem. Otherwise select the **Cancel** button.

To delete the problem select **Delete** next to the relevant problem.



Editing the list of Schedule of Rates items

To add a new Schedule of Rates item under an urgent repair problem select **New** next to another item under the relevant problem. You will be prompted for an item description and the Schedule of Rates code. You can select the **Code lookup** button to search for the relevant code. To delete the Schedule of Rates item select **Delete** next to the relevant item.



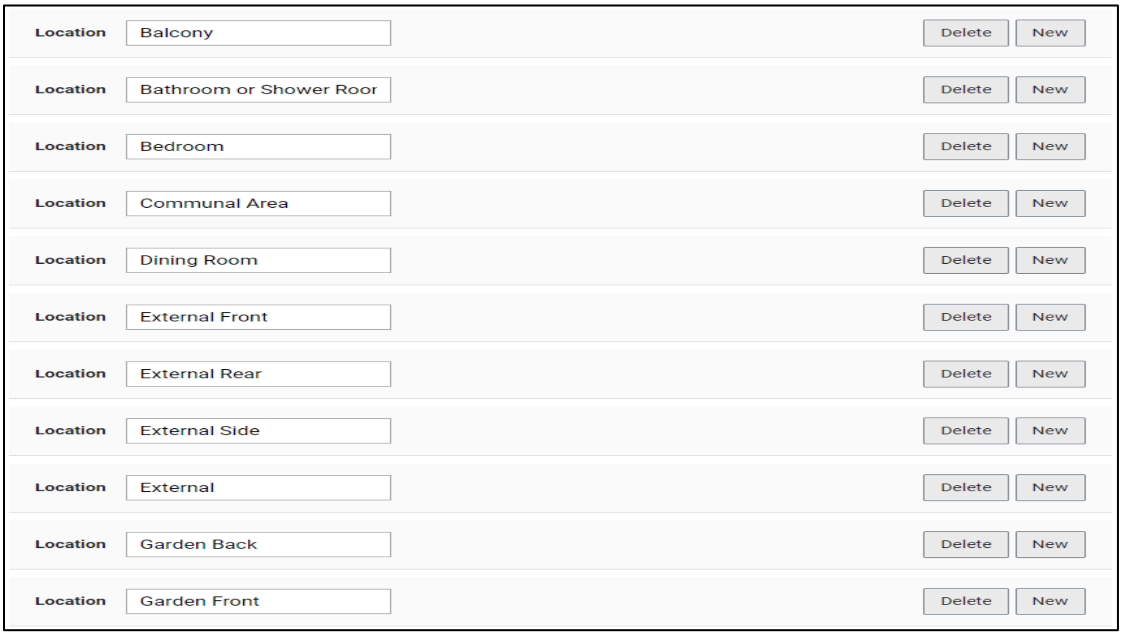
Editing Locations (Reporting mode)

When a User selects a repair problem, they will be presented with a drop-down list containing a standard list of locations for the repair. These locations are hard-wired and change depending on the category of the repair problem. This is useful if the tenant is not going to be home to show the repair operative the location of the problem.

The Locations resource can be used to override the default list of locations. If these locations are edited, they will replace the default list of locations. Unlike the default list, these locations will remain the same regardless of the repair category.

The user will not be prompted for a location if you have not checked **Display location option** in settings.

To add a new location, select **New** next to one of the other locations. To delete a location select **Delete** next to the relevant location.



Editing Messages

One of the key features of M3Central is the high degree of customisation that users can undertake. The Messages resource allows you to edit most of the text you see in the M3Central interface.

There are two resources for Messages: one for English and one for Welsh language support. It is up to you to ensure that the English and Welsh resources are synchronised. The Welsh language resources will not appear if you have not checked the **Enable Welsh support in Editor** option in settings.

If you want to edit specific text, and are not sure which Messages text box to edit, you can find the correct box by doing a text search. To do a text search select **Find** from your browser menu, or hit **Ctrl + F** (Windows)/**Cmd + F** (Mac OS) on your keyboard.

Repair Reporting – Repair selection (Reporting mode)

Under this section you can edit the text the user sees when reporting a repair using the graphics.

Repair Reporting – Postcode Redirection (Reporting mode)

This section is useful if you are redirecting repair reports to different addresses based on the user's postcode. You can add text to remind the user of the importance of entering the correct postcode.

Repair Reporting - Sending reports (Reporting mode)

Under this section you can edit the text the user sees when sending a repair report.

Repair Diagnostics: Messages displayed with SOR item (Diagnostics mode)

Under this section you can edit the messages that appear under the Schedule of Rates item when a user selects a solution from a repair area.

The top box contains the message that appears if an item is marked as rechargeable. The middle box contains the message that appears in front of the value assigned to a rechargeable item. Refer to the Editing Repair Problems section for more information on marking items as rechargeable.

The bottom box contains the message that appears if the item refers to a qualifying repair that must be carried out within a legally prescribed time limit.

Repair Reporting: Tenant's responsibility message (Reporting mode)

Under this section you can edit the message that appears if a repair has been marked as tenant's responsibility. Refer to the Editing Repair Problems section for more information on how to set an item as tenant's responsibility.

Repair Reporting: Optional message at bottom of confirmation page (Reporting mode)

Under this section you can enter text to appear at the bottom of the confirmation page after a user sends a repair report.

Repair Reporting: Optional message at top of first page (Reporting mode)

Under this section you can enter text to appear at the top of the M3Central Reporting home page.

Repair Diagnostics: Optional message at top of first page (Diagnostics mode)

Under this section you can enter text to appear at the top of the M3Central Diagnostics home page.

Repair Reporting: Optional message to replace free text report option (Reporting mode)

Under this section you can enter text that will appear in place of the free text comments box.

Message following Diagnostics POST (Diagnostics mode)

Under this section you can enter text that appears after selected repair items have been POSTed.

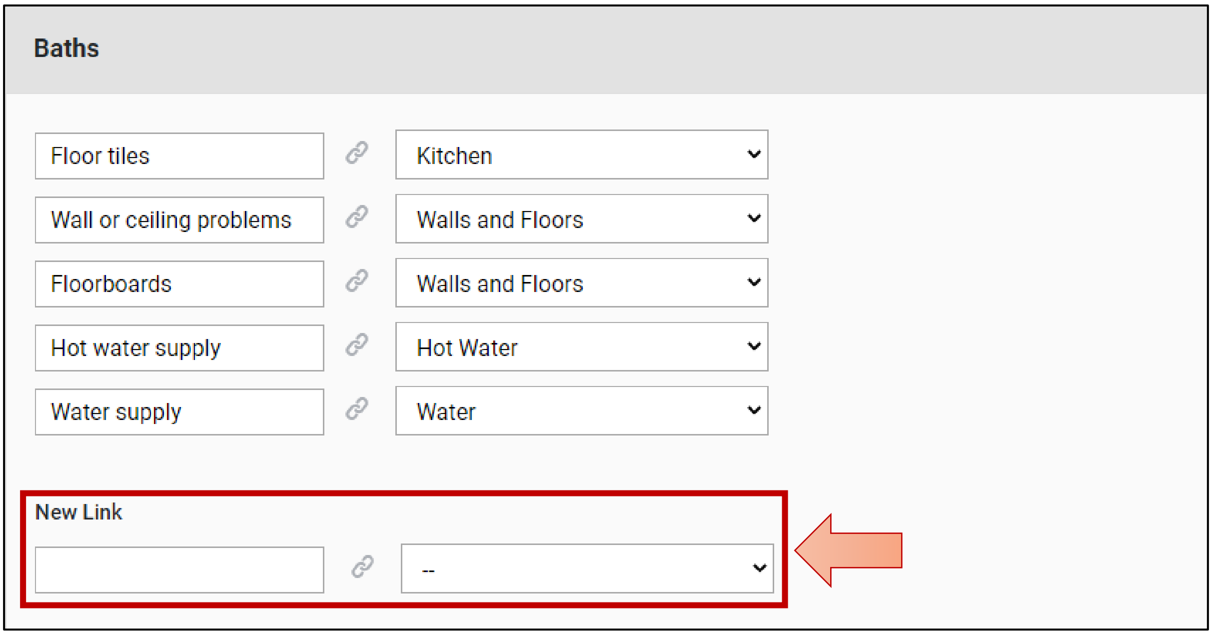
Editing Quick Links

Quick links are shortcuts to other repairs categories. They are a useful shortcut when a user is unsure what repair group a particular problem falls under. Refer to the Using the system section for more information on using quick links when reporting or diagnosing a repair.

There are four resources for Quick Links: two for Reporting mode (English and Welsh), and two for Diagnostics mode (English and Welsh). It is up to you to ensure that the English and Welsh resources are synchronised. The Welsh language resources will not appear if you have not checked the **Enable Welsh support in Editor** option in settings.

To add a new quick link, enter a description in the **New Link** field and select the repair category is shortcuts to from the **link** drop-down list. To remove a quick link, just delete the text from **New Link** field.

Remember to select the **Save Changes** button or your changes will be lost.



Editing Repair Problems

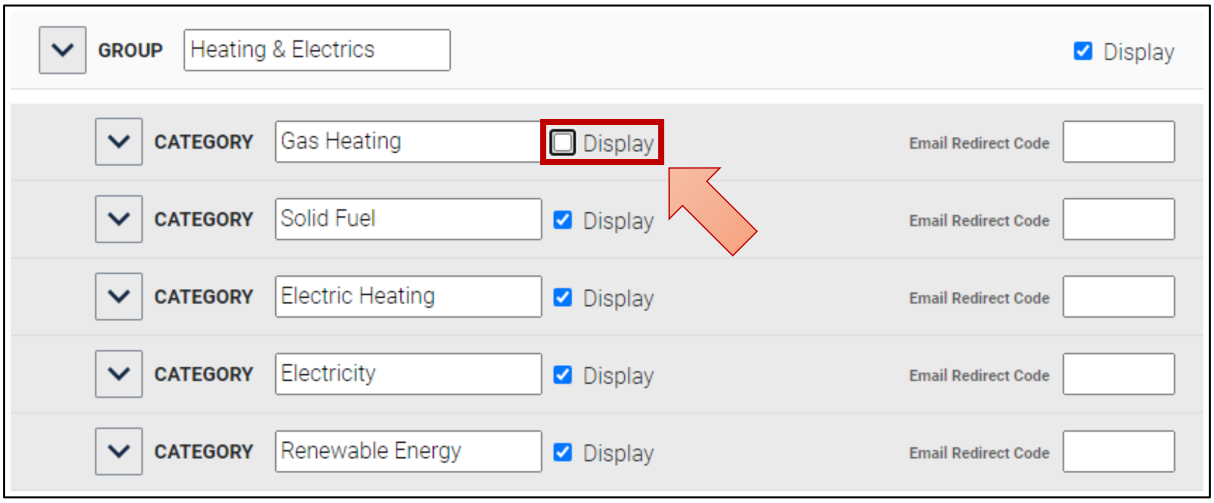
Load Repair Problems to change which repair problems are displayed and which Schedule of Rates items they link to. There are three resources for Repair Problems: one for Diagnostics mode, one for Reporting mode and one for the Welsh language Reporting mode. It is up to you to ensure that the English and Welsh resources are synchronised. The Welsh language resources will not appear if you have not checked the **Enable Welsh support in Editor** option in settings.

Repair Problems are organised into groups, categories, repair areas, problems and items. You can edit the text for all five levels. However, groups and categories map to specific images and users may get confused if the titles no longer match the image.

Filtering out repair groups and categories

You can hide a group by unchecking the **Display** option to the right of that group. To hide a category select the **+** button next to the relevant group to expand it and uncheck the **Display** option to the right of the relevant category. For example, to hide gas heating repairs expand the Heating & Electrics group and uncheck the **Display** option next to the Gas Heating category.

Doctor Damp and the Emergencies section are both edited separately but you can set their display status here.



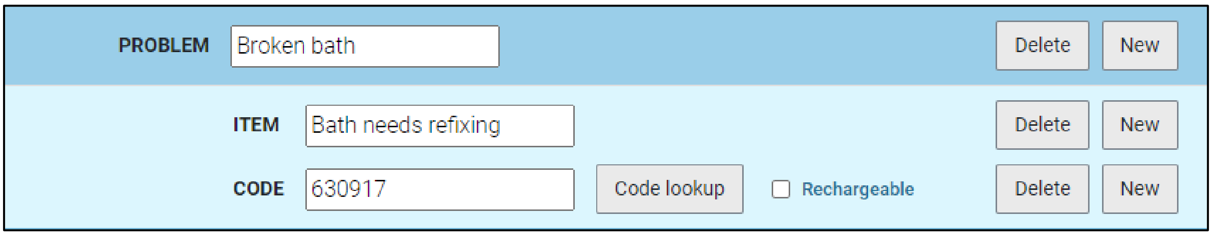
Edit links to the Schedule of Rates items

You can add new problems or items by selecting the **New** button next to an existing problem or item. You can select the **Code lookup** button to search for the relevant item code. More than one code can be added to each item.

You can delete problems or items by selecting the **Delete** button next to the relevant problem or item. Deleting a problem will delete all the items under it. Similarly, if you delete an item all the codes under it will be removed. If you delete all the codes under an item you will not be able to re-add the codes and will need to delete the item and recreate it.

If you delete all the problems under a repair area the repair area will be hidden. It will remain available in the Editor so you can restore it later.

Messages can be added alongside or instead of the Schedule of Rates item. If you replace all codes with a message, then only the message will be displayed. If you have a code as well as a message then the message will be displayed in the repair report form (Reporting mode) or along with the Schedule of Rates item (Diagnostics mode).



Directly linking to pages in M3Central

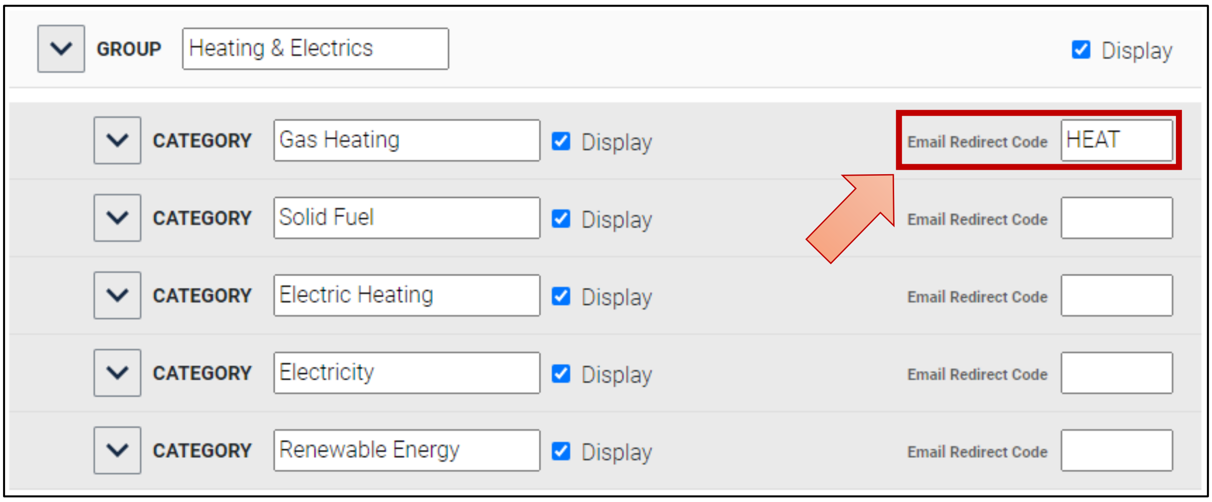
Select the **Show link codes** button on the top left to see the codes needed to directly link to a page in M3Central. For example, if you want to link directly to the Bath screen you would add the parameter **page=b1**. If you also want to bring up the links for bath panels you would add the parameter **ra=bathpanel1**:

https://m3central.net/index.cfm?ID=514884&page=b1&ra=bathpanel1

These links could be used as part of a script to assist users. The link codes can vary depending on whether you are using Reporting or Diagnostics Mode, and which Schedule of Rates underlies the set of repair problems. It is advisable to check the links work before they are deployed.

Redirect repair problems to different email addresses

You can redirect categories of repairs to different email addresses by entering an **Email Redirect Code**. Refer to the Defining additional email addresses section for more information on how to add email addresses and create a redirect code.



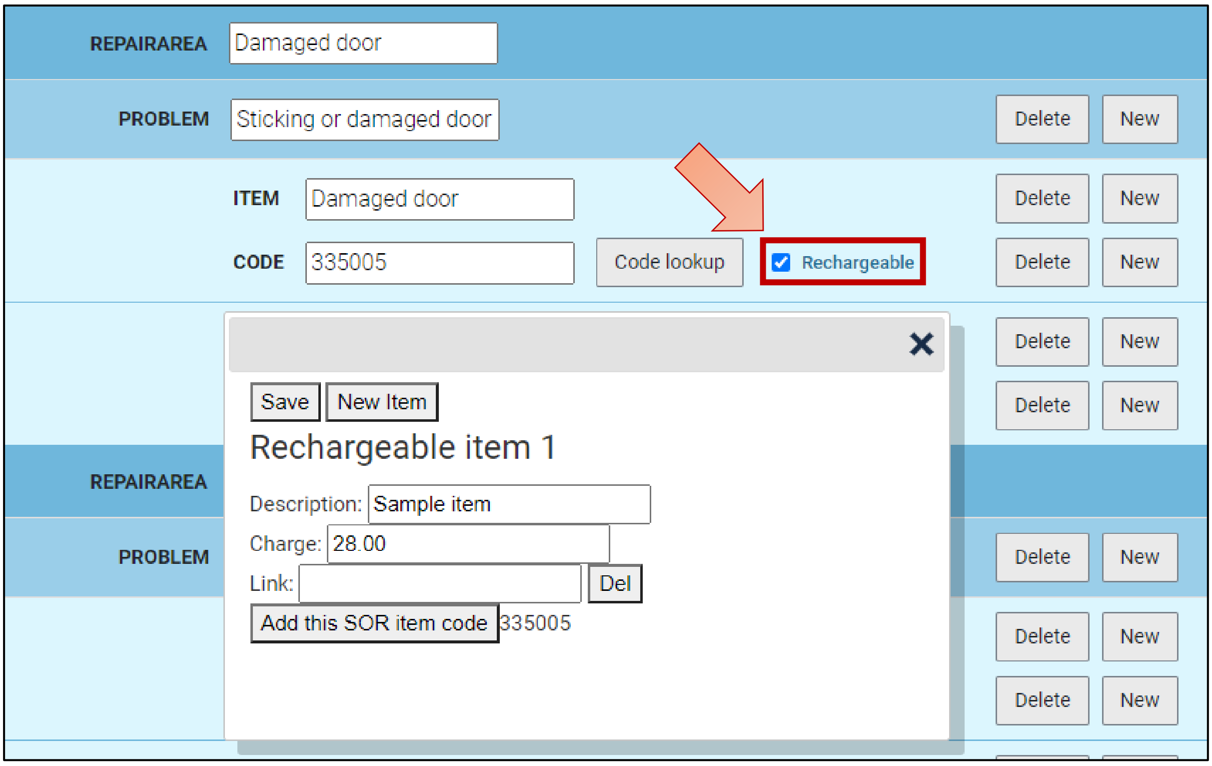
Mark items as tenant responsibility (Reporting mode)

To mark an item as tenant responsibility check the **Tenant's Responsibility** option to the right of the relevant item. This will prevent the user from being able to report that item. They will instead get a message stating that it is the tenant's responsibility. You can edit this message using the Messages resource.

Mark items as rechargeable (Diagnostics mode)

To mark an item as rechargeable check the **Rechargeable** option to the right of the relevant item. This will display a message informing the user that an item may be rechargeable when they view the Schedule of Rates item. You can edit this message using the Messages resource.

Selecting the **Rechargeable** link will open a dialog box you can use to specify the actual charge for which a tenant could be liable if the repair was carried out.



Editing the Schedule of Rates (Diagnostics mode)

The Editor allows you to edit the Schedule of Rates using the Schedule of Rates resource. Refer to the Settings section for more information on how to select the underlying Schedule of Rates. Also remember to select the **Save Changes** button once you have finished making all of your edits to ensure you don't lose your changes.

Applying filters

You can exclude Schedule of Rates items that are not applicable by checking the **Filter** option to the left of the relevant trade, heading, subject or item. Filtering out items simply hides the Schedule of Rates items, it does not delete them.

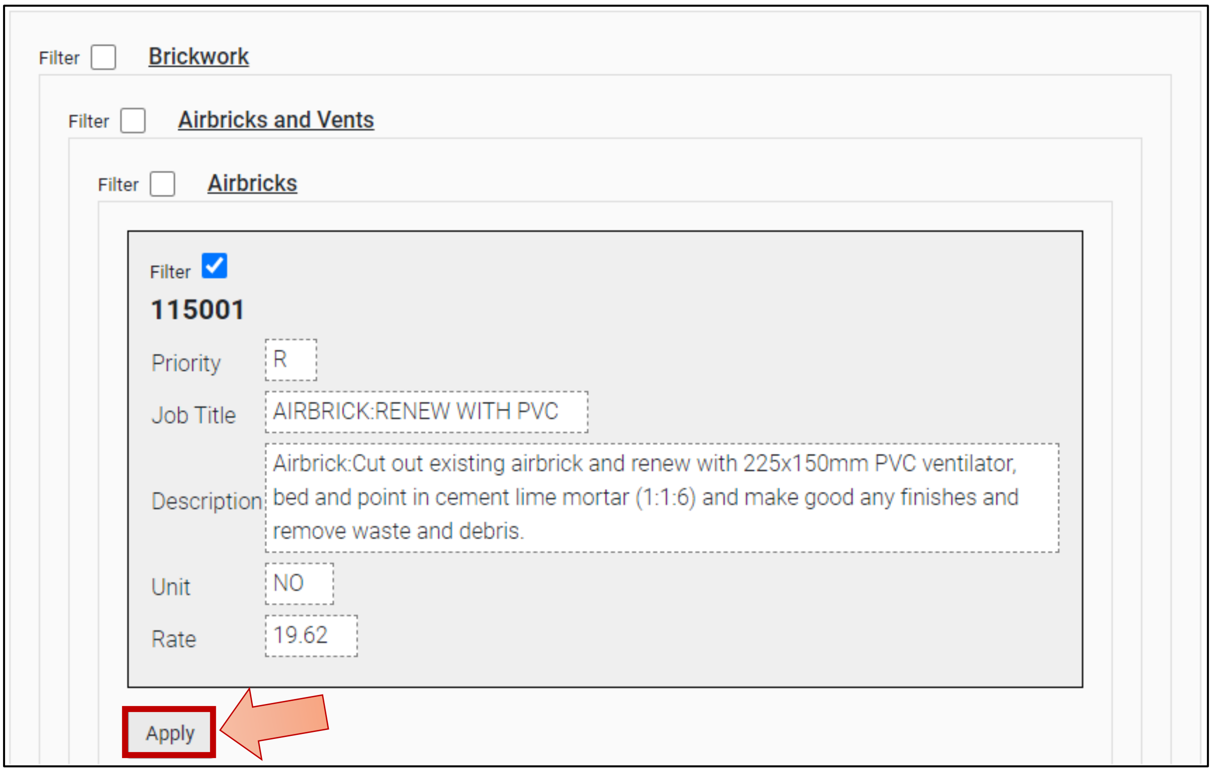
If you filter out a trade or heading, all items below that heading will be filtered out. If a heading is red it indicates that a filter has been applied at a lower level.

To filter all out all items except those linked to repair problems, select the **Filter by Links** button.

Amending Schedule of Rates items

You can find the Schedule of Rates item you want to amend by selecting the relevant trade, heading and subject. Alternatively, if you know the code of the item, you can enter the code into the **Search by SOR** field and then select the **Search SOR** button.

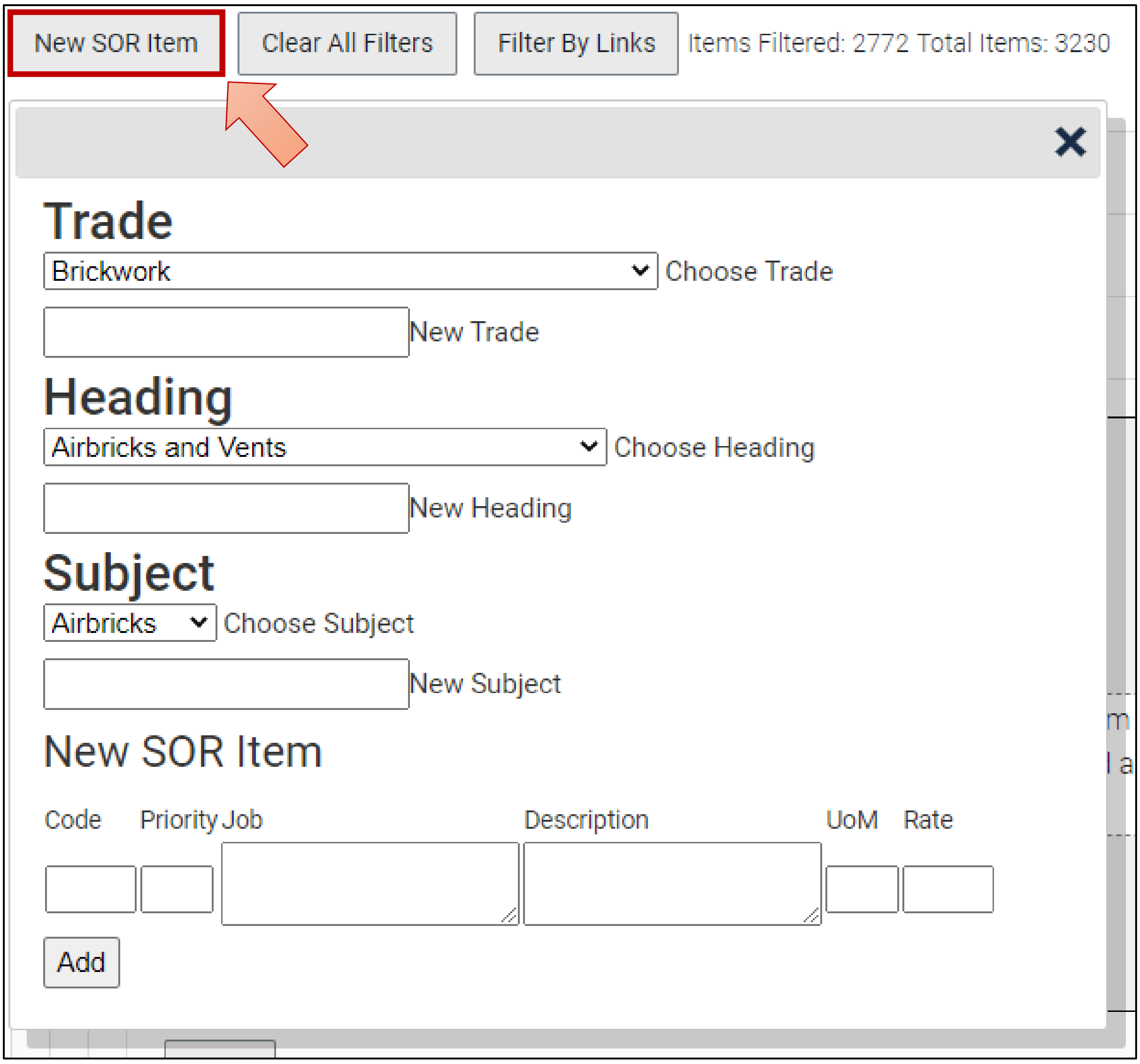
You can amend all the text associated with the Schedule of Rates item, except for the code. Once you have finished making changes to an item you must select the **Apply** button or you will lose your changes.



Adding new Schedule of Rates items

Select the **New SOR Item** button to add a new Schedule of Rates item. You can assign the new item an existing trade, heading and subject or create new ones.

Once you have entered all the details for the new item, select the **Add** button.



Deleting a new Schedule of Rates item

You can delete Schedule of Rates you have added or customised by selecting the **Delete** button next to the item. The Delete button will only appear for items you have added or amended. If you delete an amended item it will be restored to its original state (prior to the amendments).

Editing the User Information Form (Reporting mode)

The user information form is only displayed if the repair reports are sent via email and users are not accessing M3Central via a portal.

There are two resources for the user information form: one for English and one for Welsh language support. It is up to you to ensure that the English and Welsh resources are synchronised. The Welsh language resources will not appear if you have not checked the **Enable Welsh support in Editor** option in settings.

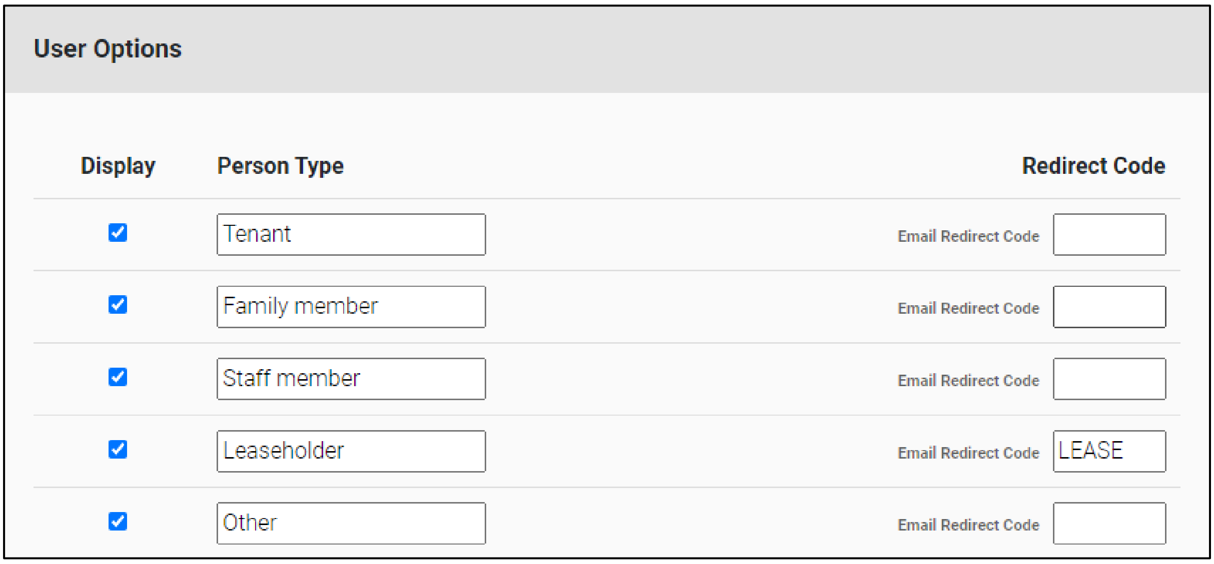
The two text boxes at the top of the page allow you to enter text at the top of the form, and above the access information section of the form.

User options

The **User Options** section allows you to create user types. Only user types that are checked will be displayed in the form. The user can only choose one type. If the user chooses any option other than Tenant, the form will display additional fields so the user can specify their name as well as the name of the occupier.

You can also enter an **Email Redirect Code** to route all reports from certain user types to a specified email address. Refer to the Defining additional email addresses section for more information on how to add email addresses and create a redirect code. This email redirect will override all other redirects.

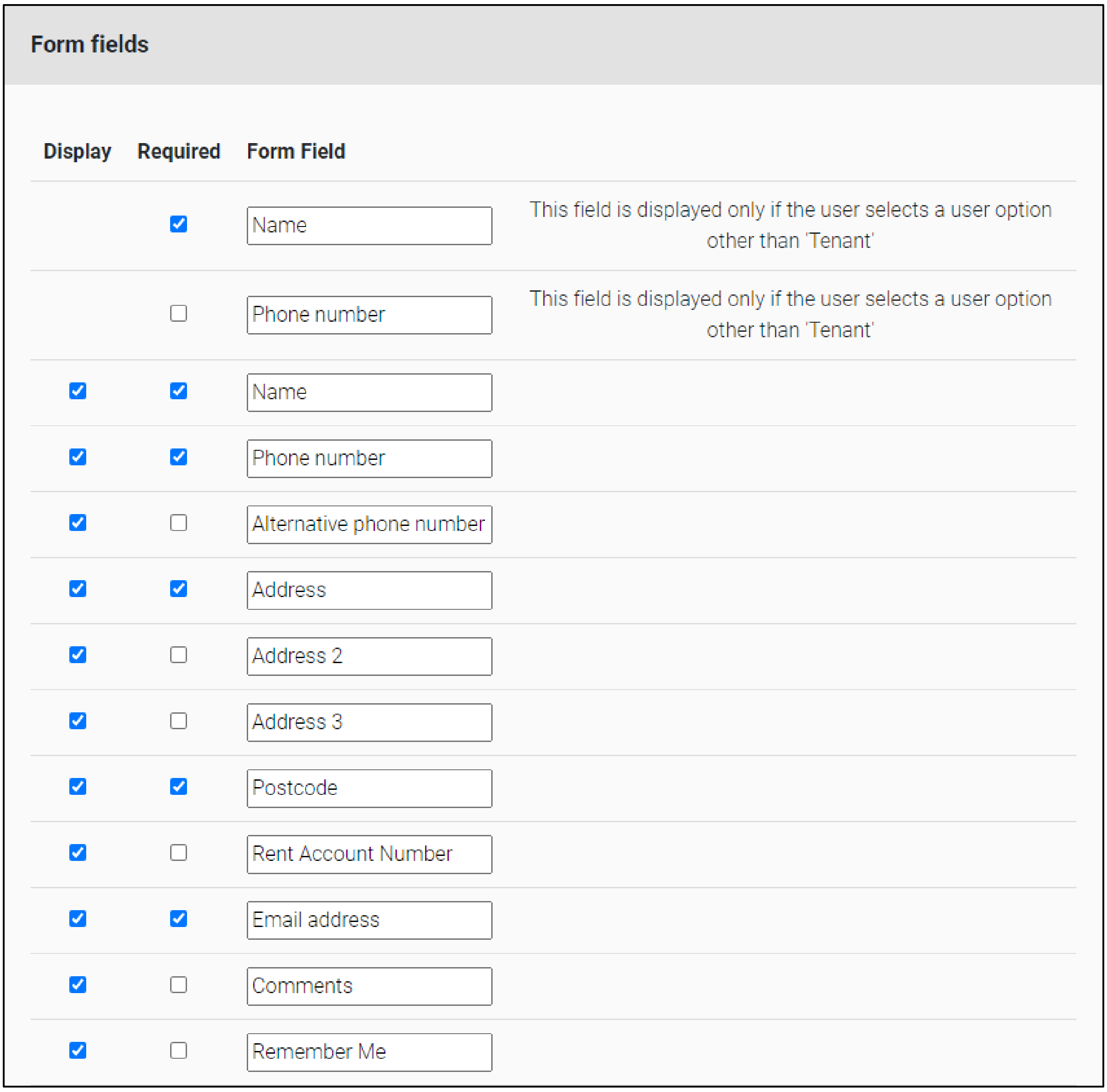
Refer to the Reporting a Repair section for more information on using quick links when reporting or diagnosing a repair.



Form fields

You can choose to show or hide a field by checking or unchecking the relevant option in the **Display** column. To mark a field as required check the relevant option in the **Required** column. You can also edit the names of the fields.

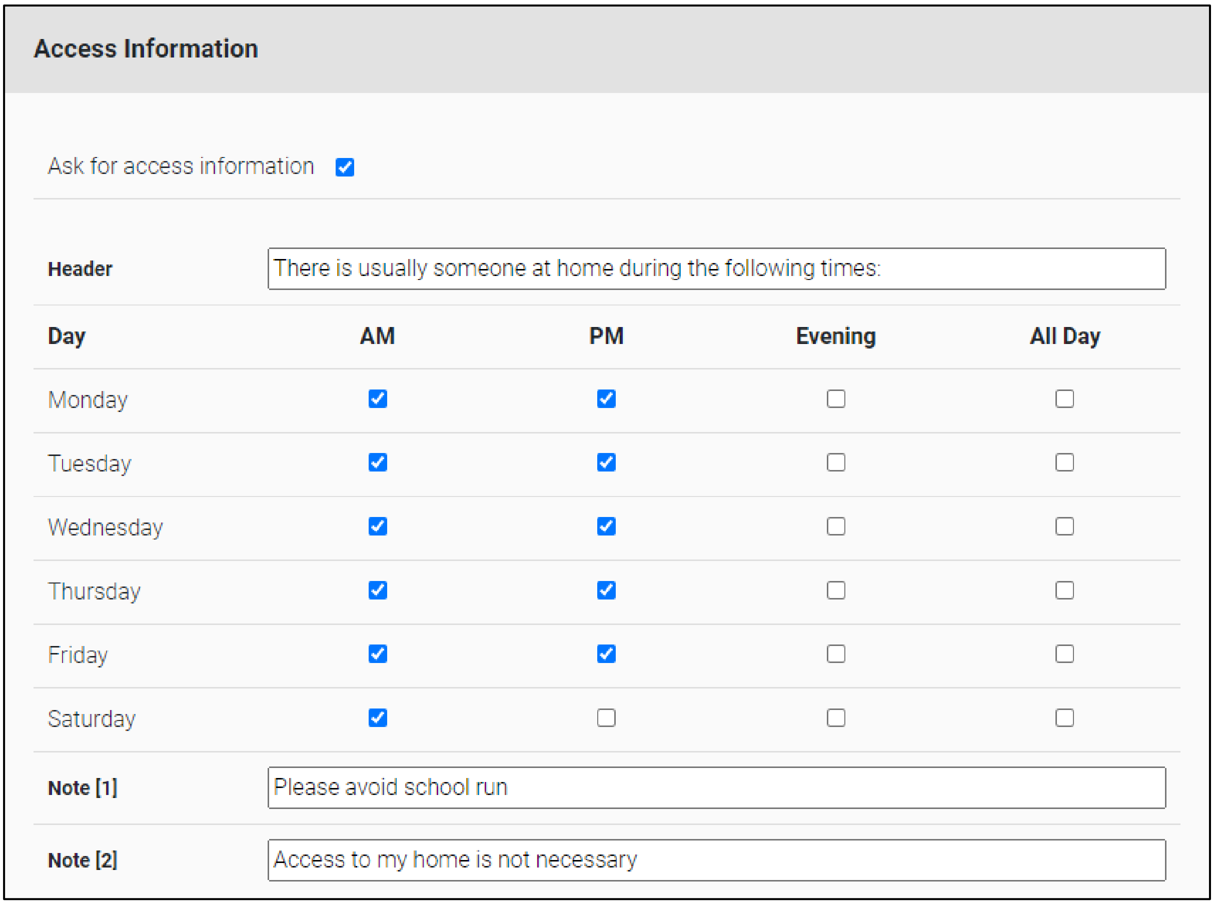
The first two fields are always hidden unless the user has selected a user type other than Tenant.



Access information

If **Ask for access information** is checked the user will be prompted for access information. Please note, M3Central is not integrated with any appointment system. It simply passes on the information provided by the user.

By default, the user is asked to specify which mornings or afternoons during the days of the week they are available. Check the options you would like to offer the user.



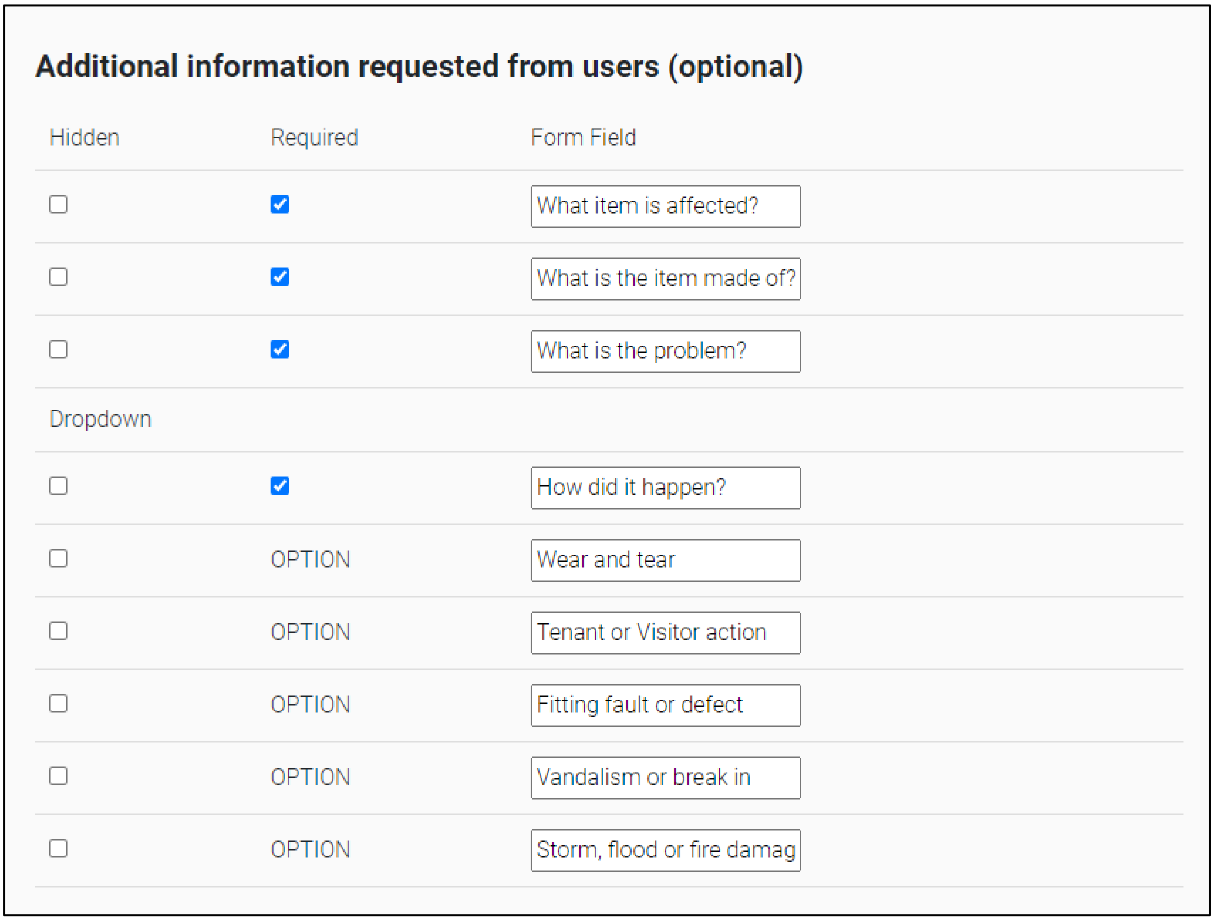
If you elected to provide the user with specific dates to choose from, you will not be provided with any check boxes as the dates are system generated. Refer to the Settings section for more information on how to set M3Central to display specific days for the user to select.

You can also edit the text for the header and add additional notes, such as **Please avoid school run** and **Access to my home is not necessary**.

Additional information requested from users (Reporting mode)

You can choose to ask the User up to four additional questions to get more information about the repair. You can choose to show or hide a question by checking or unchecking the relevant option in the **Hidden** column. To mark a field as required check the relevant option in the **Required** column. You can also edit the names of the fields.

The first three rows relate to questions that require a text answer from the User. The fifth row relates to a question where the user selects from a drop-down list of answers. You have up to five options in the drop-down list.

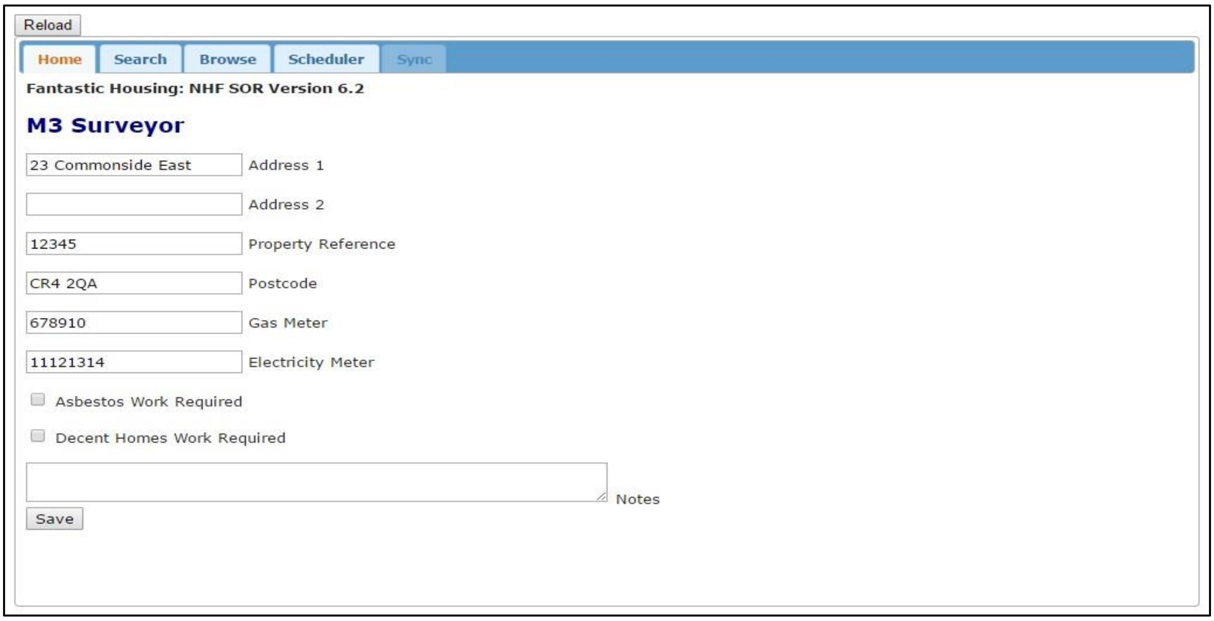


Additional information requested from users (optional)

Hidden	Required	Form Field
☐	☑	What item is affected?
☐	☑	What is the item made of?
☐	☑	What is the problem?
Dropdown		
☐	☑	How did it happen?
☐	OPTION	Wear and tear
☐	OPTION	Tenant or Visitor action
☐	OPTION	Fitting fault or defect
☐	OPTION	Vandalism or break in
☐	OPTION	Storm, flood or fire damag

Editing the M3Surveyor cover form (Diagnostics mode with M3Surveyor)

The M3Surveyor home page contains a form which is used to enter a property's details. Refer to the Using M3Surveyor to create a schedule of works section for more information on how to use M3Surveyor.



You can use the Editor to modify the cover form to collect different types of information. Fields cannot be added to the form, but existing fields can be edited.

Show to User	Display Name	Keyname	Type
☑	Address 1	address1	input
☑	Address 2	address2	input
☑	Property Reference	Propref	input
☑	Postcode	postcode	input
☑	Gas Meter	gmeter	input
☑	Electricity Meter	emeter	input
☐	Water Meter	wmeter	input
☐	Extra field	extrainput	input
☑	Asbestos Work Required	asbestos	checkbox
☑	Decent Homes Work Requ	decenthomes	checkbox
☐	Extra checkbox	extracheckbox	checkbox
☑	Notes	notes	textarea

The columns are explained in the table below:

Column	Explanation
Show to User	If a field is checked it will be displayed.
Display Name	The label of the field.
Keyname	The name of the variable that gets returned when a form is saved. I.E. address1: 23 Commonside East
Type	The description of the field type. The type will be **input** (single line of text), **textarea** (multiple lines of text), or **checkbox**. The field type cannot be changed.

Remember to select the **Save Changes** button or your changes will be lost.

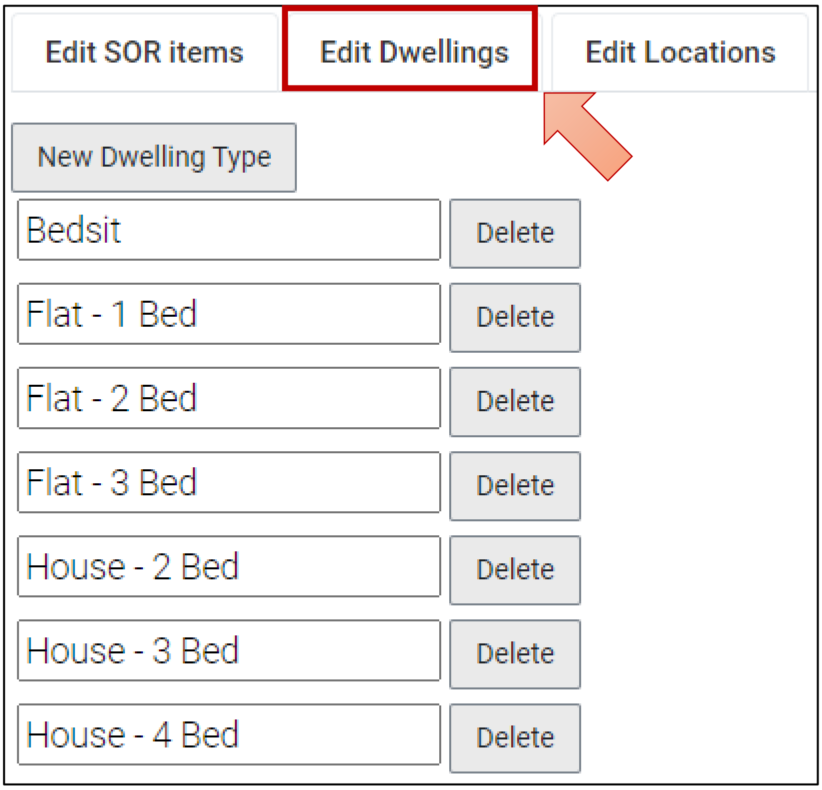
Editing the M3Surveyor template (Diagnostics mode with M3Surveyor)

M3Surveyor provides templates you can use to define categories and locations for a list of repairs. For example, you can predefine a list of repairs for a 2-bedroom flat. Templates are typically used for void inspections. Refer to the Using M3Surveyor to create a schedule of works section for more information on how to use M3Surveyor.

You can use the Editor to modify the templates, including the dwelling types, locations and lists of Schedule of Rates items.

Editing dwellings

Select **Edit Dwellings** to add or remove dwelling types. You can add your own categories, which do not necessarily need to be actual dwellings. A dwelling is a collection of locations and cannot be directly associated with Schedule of Rates items, only to the locations.



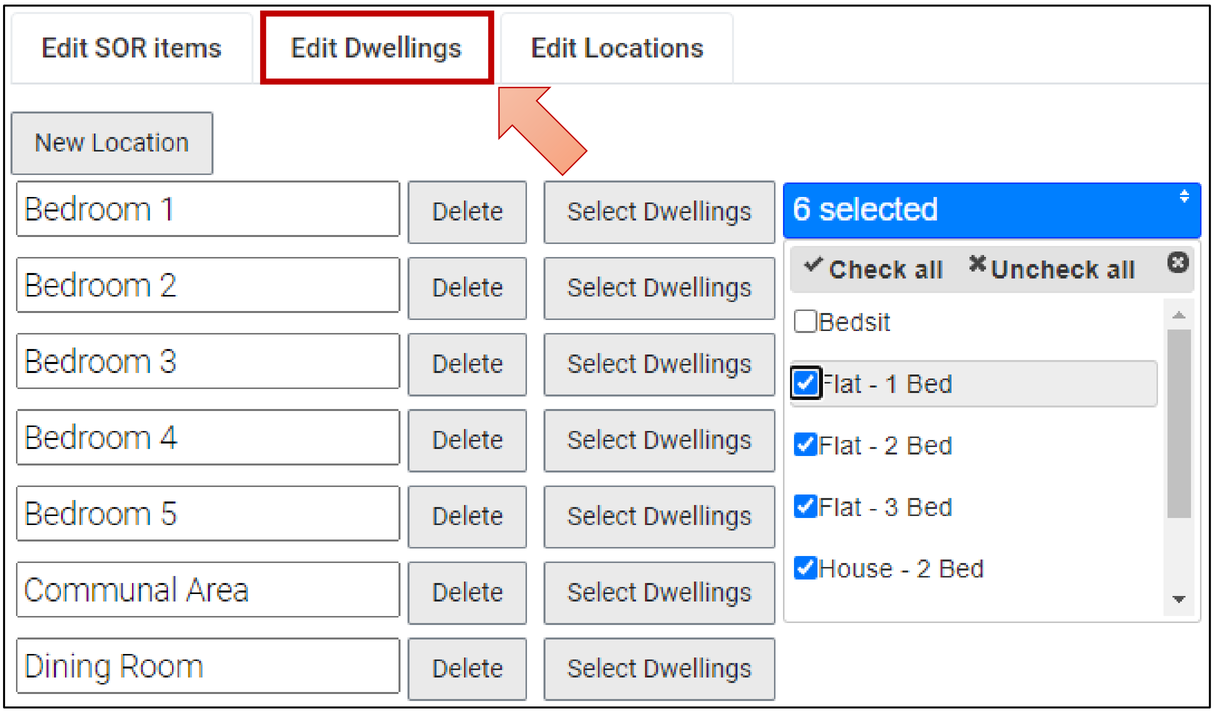
Editing locations

Select **Edit Locations** to edit locations and assign them to dwellings.

To add a new location, select the **New location** button. You could define a new location for a room type, or for any other heading you want to attach a list of Schedule of Rates items to. For example, you might want to create a location called 'electrics' or 'heating'.

To remove a dwelling select the **Delete** button.

To assign a location to a dwelling, select the **Select Dwellings** button. You can assign a location to one or more dwellings by checking the appropriate dwelling(s).



Editing Schedule of Rates lists

Select **Edit SOR items** to add or remove Schedule of Rates items attached to locations.

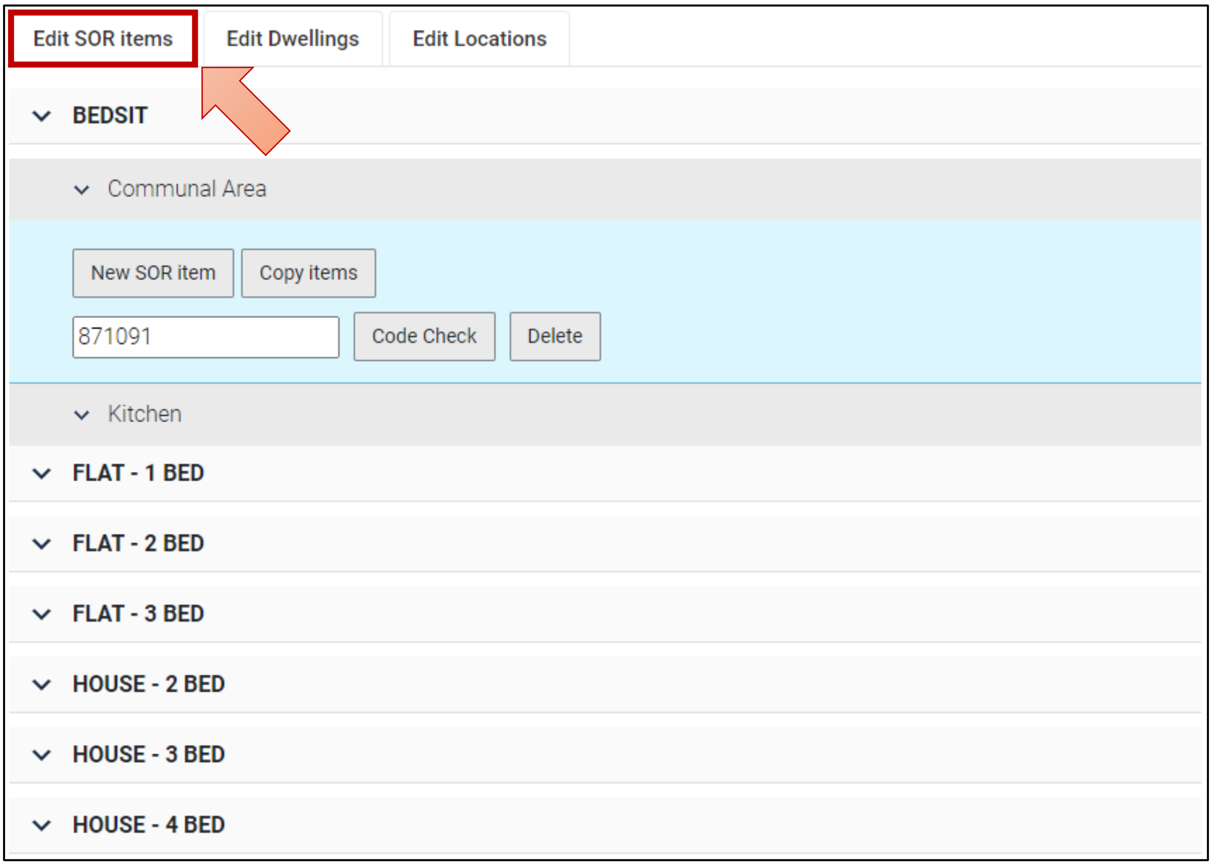
To view the items attached to a location, select a dwelling and select the location you want to access. The same location may appear under multiple dwellings. If you change the Schedule of Rates items attached to a location, the changes will be applied to all instances of that location regardless of which dwelling types they fall under.

To add a new item, select the **New SOR item** button and enter the code of the item you want to add. You can select the **Code lookup** button to search for the relevant code.

To get a description of an existing item, select the **Code Check** button.

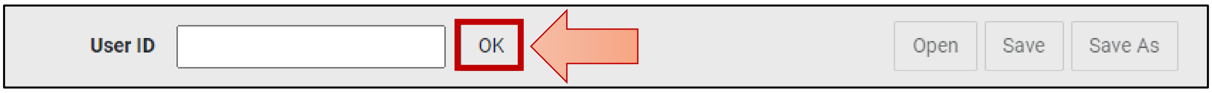
To remove an item, select the **Delete** button.

To copy a list of items to another location, select the **Copy items** buttons. You can check the locations you want to copy the list of items to.



Opening and saving templates

Before you open or save a temple you need to validate your User ID. Enter your **User ID** and select the **OK** button. Refer to the Adding or removing users (Diagnostics mode) section for more information on how to add or remove users.



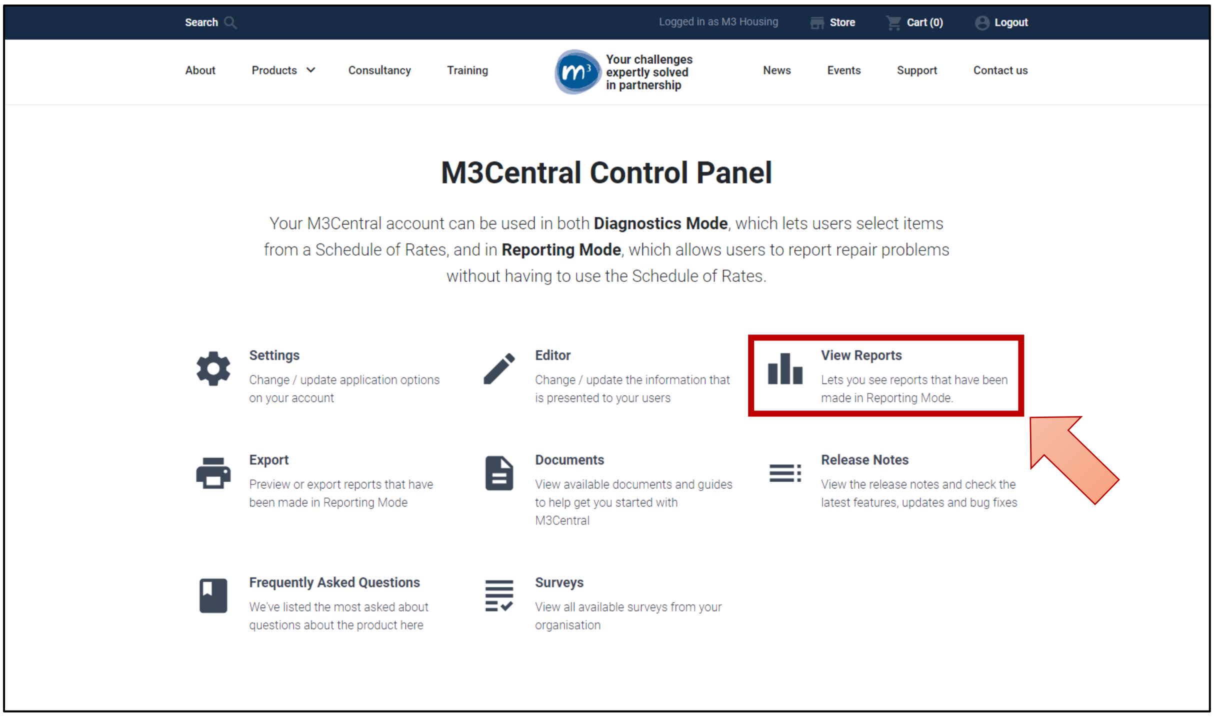
You can save a template by selecting the **Save** or **Save As** buttons. Use the **Save As** button if you want to save an amended version of your template and keep the original.

You can open lists that you have previously created by selecting the **Open** button.

You will be able to open your saved templated from within the M3Surveyor interface. Refer to the Using M3Surveyor to create a schedule of works section for more information on how to access your templates in M3Surveyor.

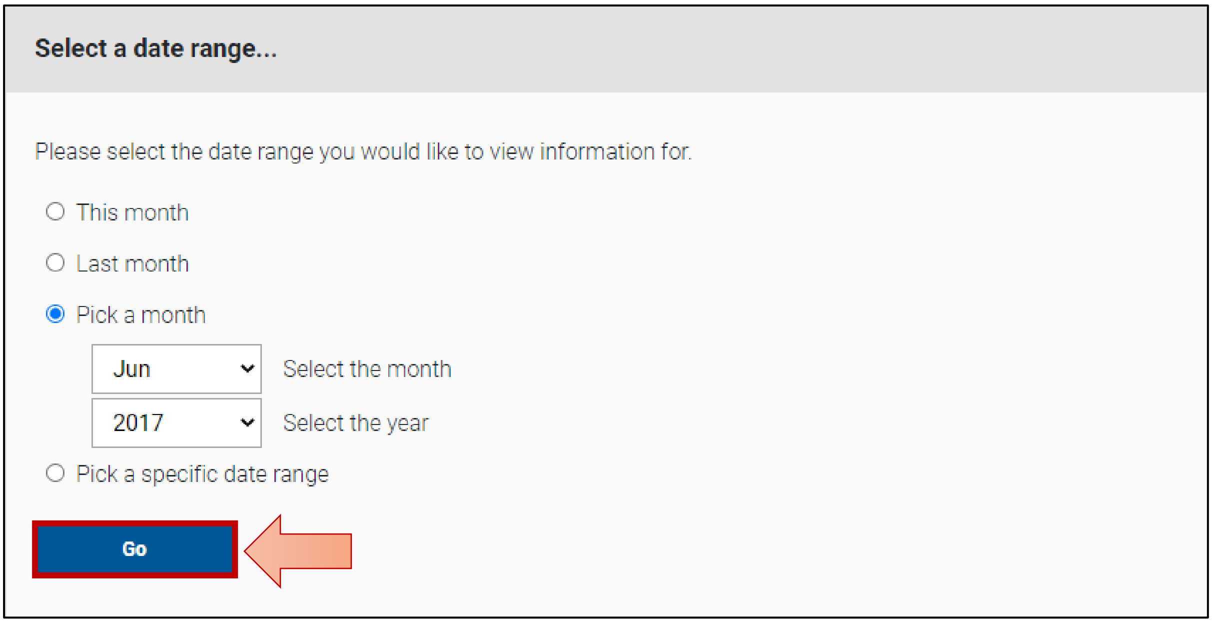
Usage reports (Reporting mode)

Usage statistics allow you to see at a glance the frequency and type of repairs being received. Subscribers to M3Central Reporting can view usage reports, including the number and types of repairs reported within a given time period. To view usage reports login to the Control Panel and select **View Reports**. These reports can be exported in an MS Excel spreadsheet format.



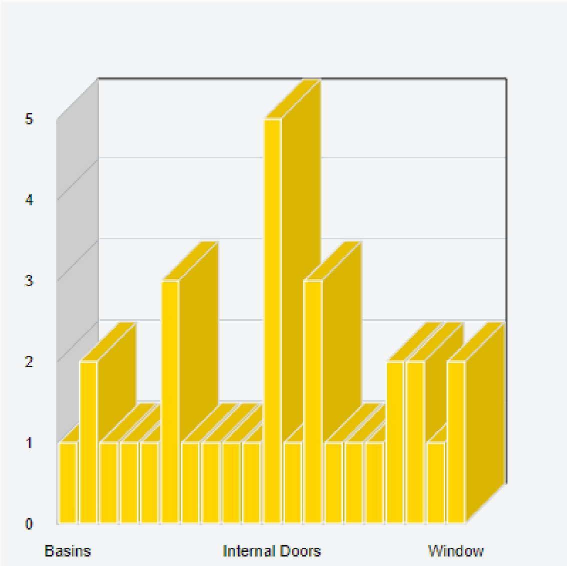
View usage within a given period

On the **View reports** page, select the date range of the reports you want to view and select the **Go** button. The chart will display the number repair items requested by category. The number of repair requests is higher than the number of reports because tenants may request more than one repair at a time.



Showing Current Data

Items requested for repair in June 2017



Total items requested for repair in June 2017 : 32
(Total number of reports: 16)

View contents of reports

At the bottom of the **View reports** page there are links to the 5 most recent reports. Select one of the links to view the contents of the respective report.

Select the **View all reports** link to view a list of all reports broken down by category. For example, to view all repair reports containing repair requests related to Basins select the **Basins** link.

Latest 5 reports

These are the latest 5 reports made via M3 Central

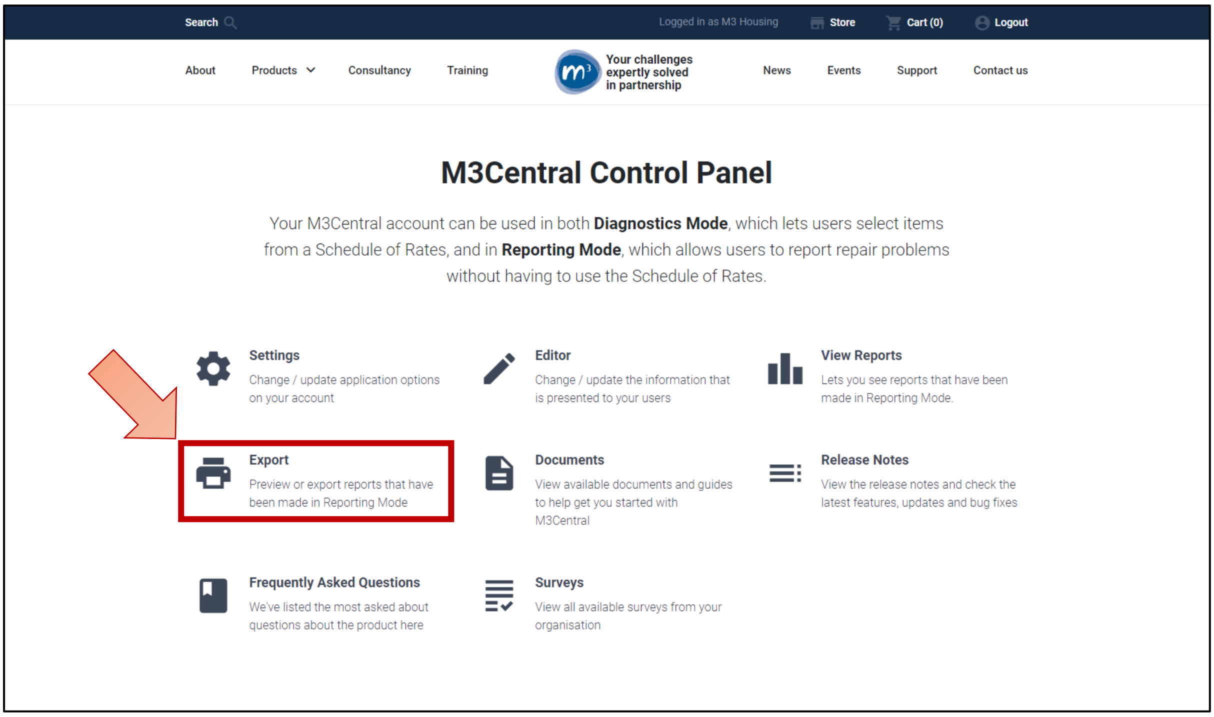
Report	Date Created	Comment
› Report 1	made on 12-Mar-2021 at 10:36:38	
› Report 2	made on 18-Feb-2020 at 16:55:05	
› Report 3	made on 18-Feb-2020 at 16:41:13	
› Report 4	made on 18-Feb-2020 at 16:39:19	
› Report 5	made on 17-Feb-2020 at 18:10:29	

› View all reports

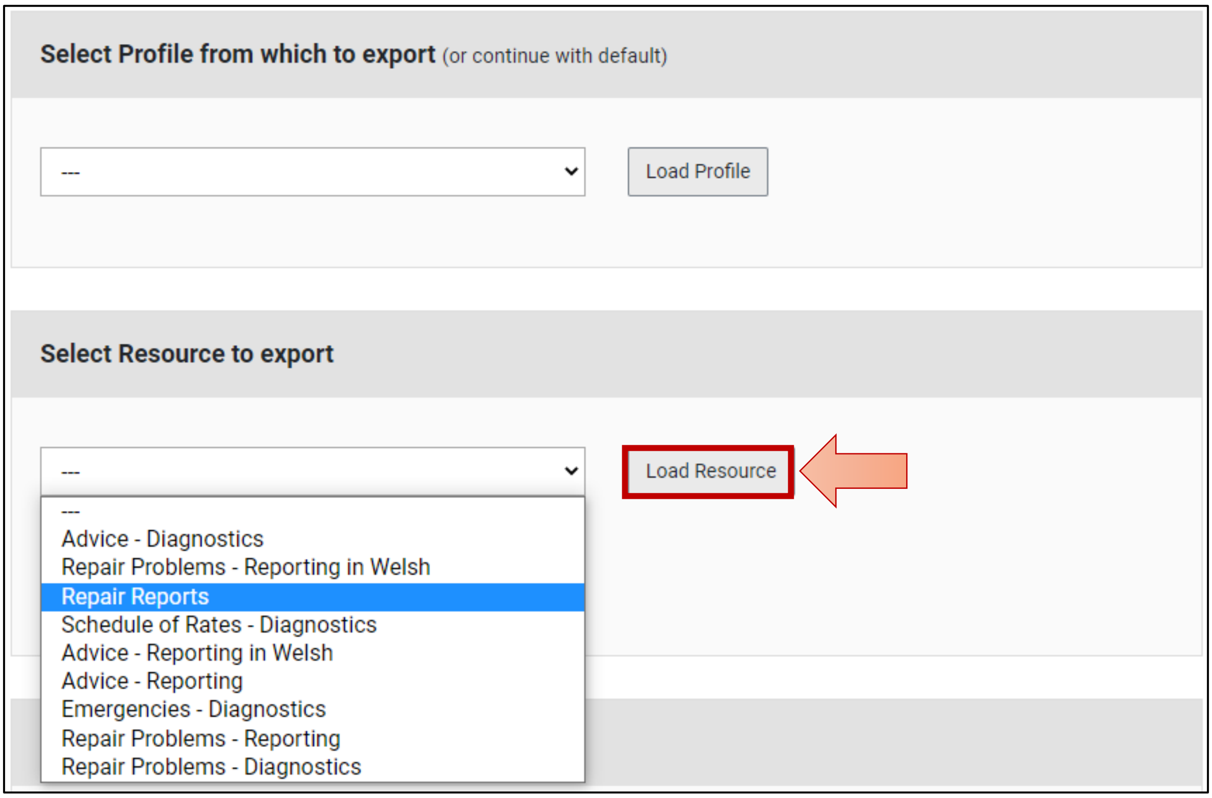
Exporting usage reports

Usage reports can be exported in an MS Excel format. These reports can be useful if you want to do some analysis on the frequency and types of repairs being ordered through M3Central. The following steps explain how to do this.

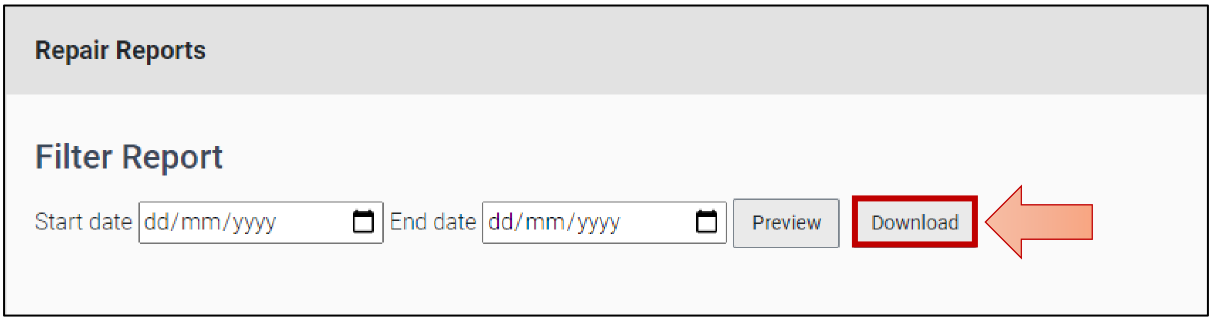
1. In the Control Panel, select **Export**.



2. From the drop-down list, choose **Repair Reports** and click the **Load Resource** button.



3. Enter a start and end date and select the **Download** button. You can save the reports in MS Excel format to the location of your choice. Select the Preview button to see a preview of the data, as it would appear in a spreadsheet, before downloading.



Using the system(M3Central Reporting)

This chapter will explain how to use the M3Central interface to report and diagnose repairs. M3Central has two modes which will be dealt with separately. The Reporting mode is used to report repairs online, and users will not see Schedule of Rates items. The Diagnostics mode is used to diagnose repairs, and helps non-technical staff quickly and accurately allocate Schedule of Rates items.

Reporting a repair

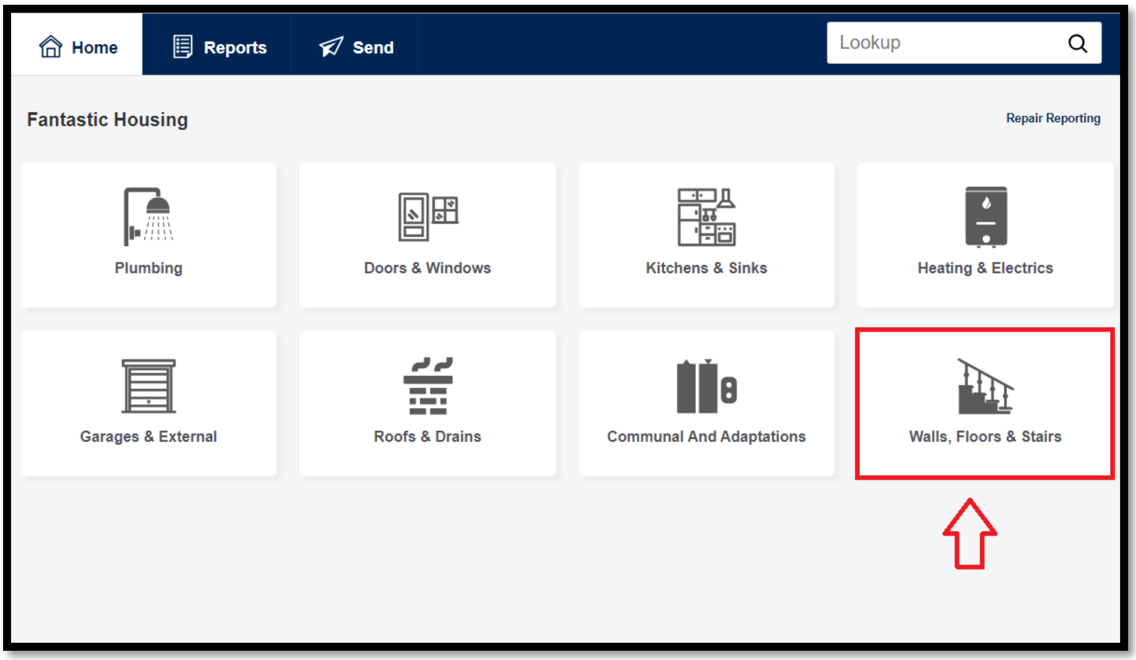
M3Central can be used to report more or one repair at a time. The instructions in this section can be adapted for use in instructional materials for tenants.

Reporting repairs using the graphics

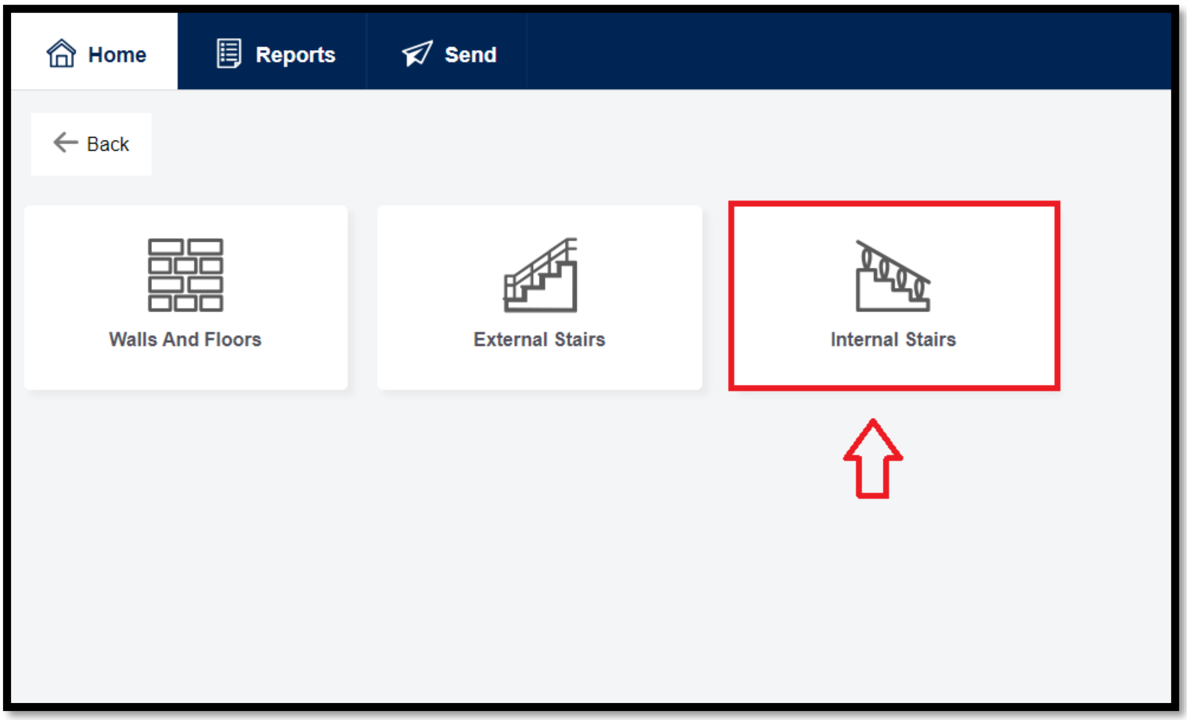
M3Central provides a graphical interface to help tenants quickly and easily report repairs. On the M3Central home page you will see approximately eight images that represent different groups of repairs. The number of images you see may vary depending on which groups you have elected to display in the Control Panel. Refer to the Editing Repair Problems section for more information on how to show or hide repair problems.

This section assumes that you want to report a broken stair post.

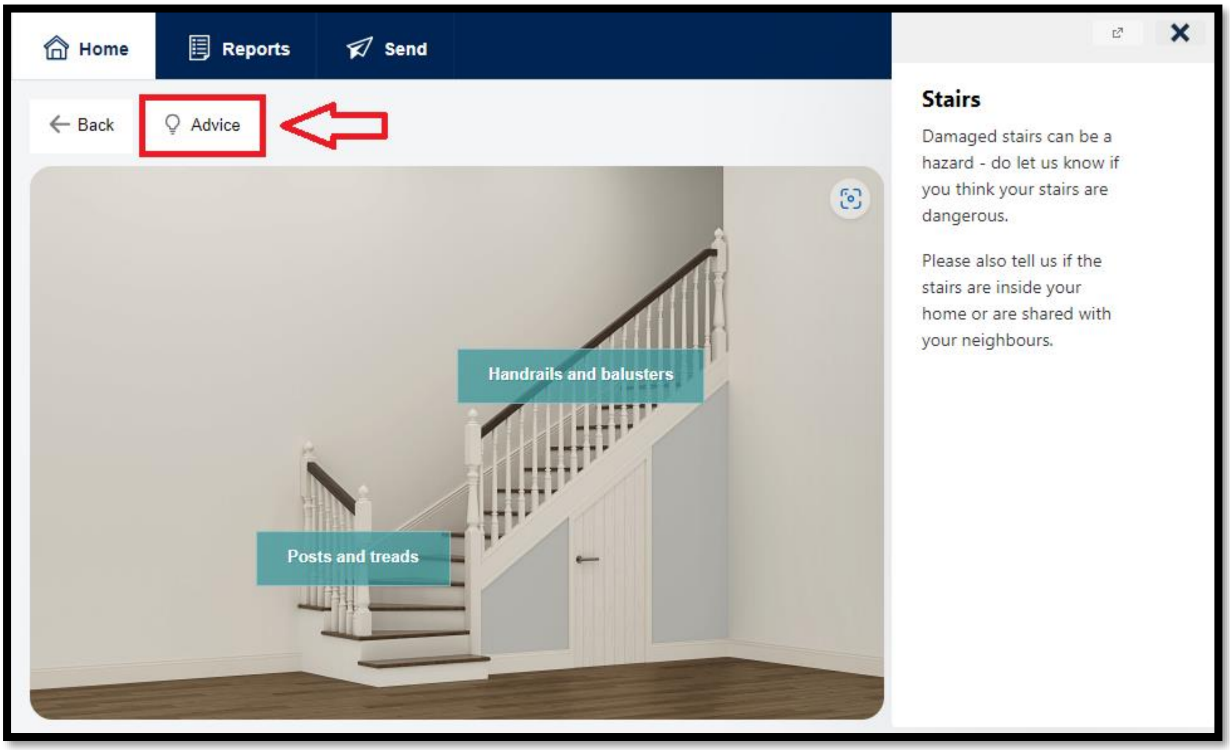
1. **Select the group that covers the repair you want to report.** In this case you would select the **Walls, Floor & Stairs** group.



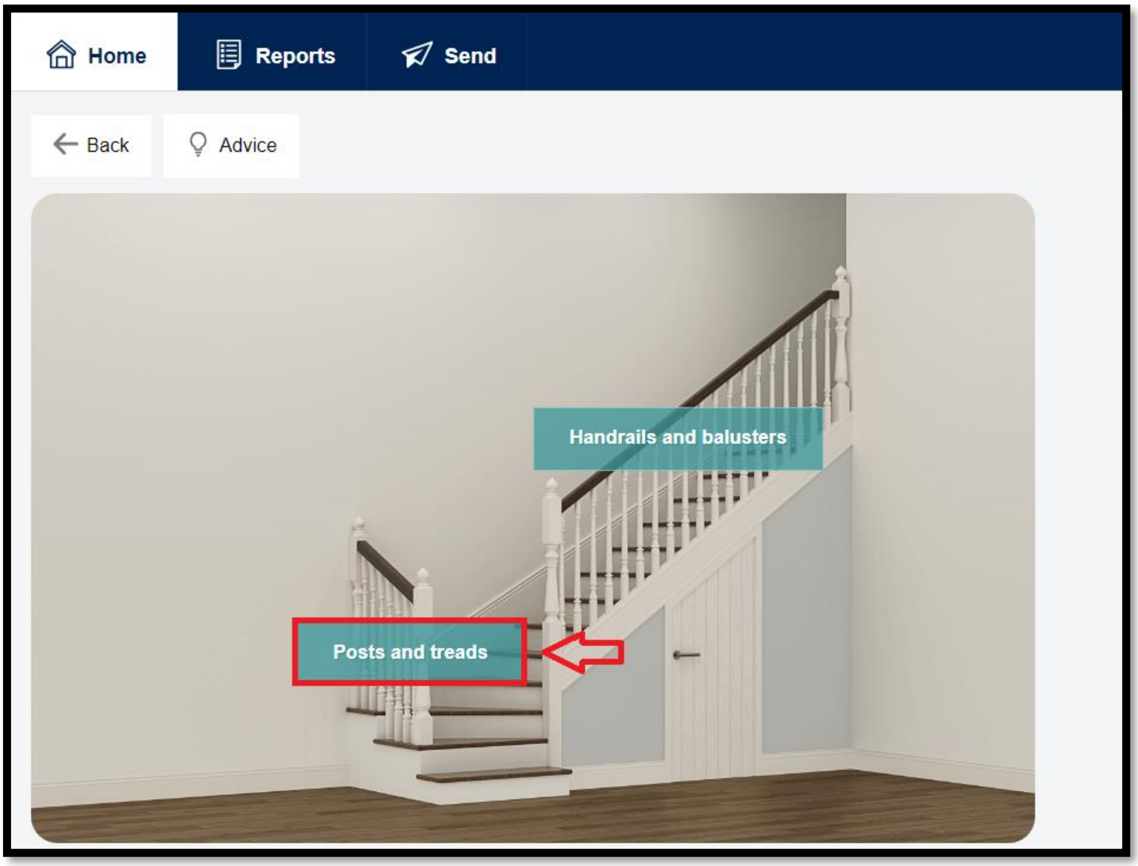
2. **Select the category of the repair you want to report.** In this case you would select the **Internal Stairs** category.



3. **Optional: Select the Advice button to view advice.** This opens a window with advice relevant to repair category you selected. Refer to the Editing Advice section for more information on how to edit the advice text.

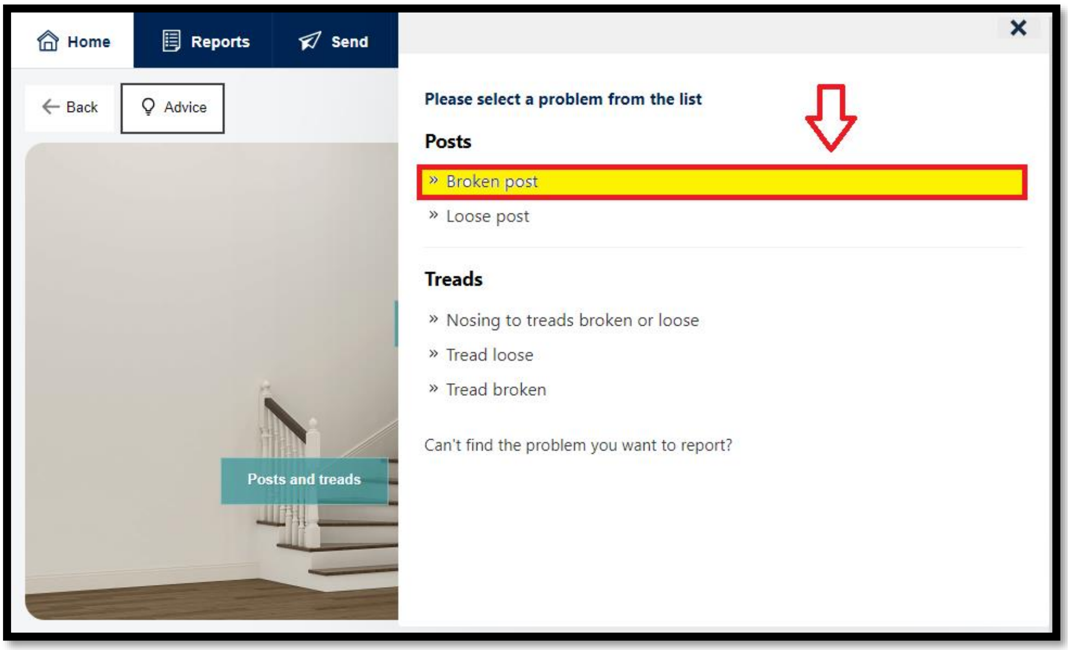


4. **Select the relevant repair area.** In this case you would select the **Posts and treads** repair area.

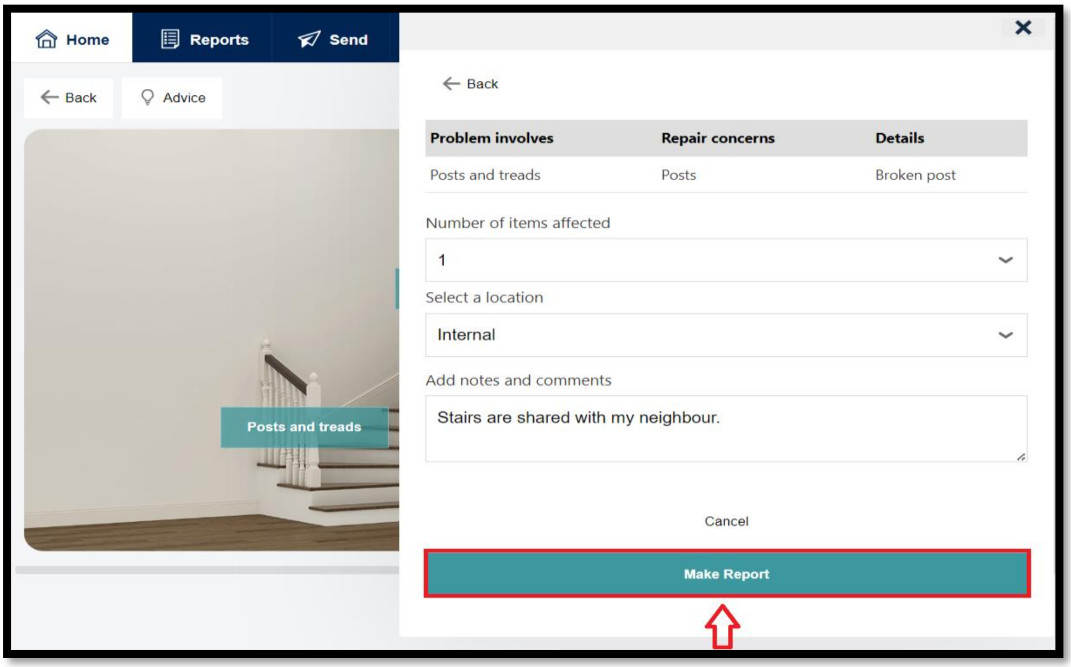


5. **Select the problem that best describes the repair you want to report.** In this case you would select **Broken Post**.

   If you can't see the problem you want to report, select **Can't find the problem you want to repair?** This opens a window where you can manually type in a description of the problem, or select a suggested page that might include the problem you want to report.

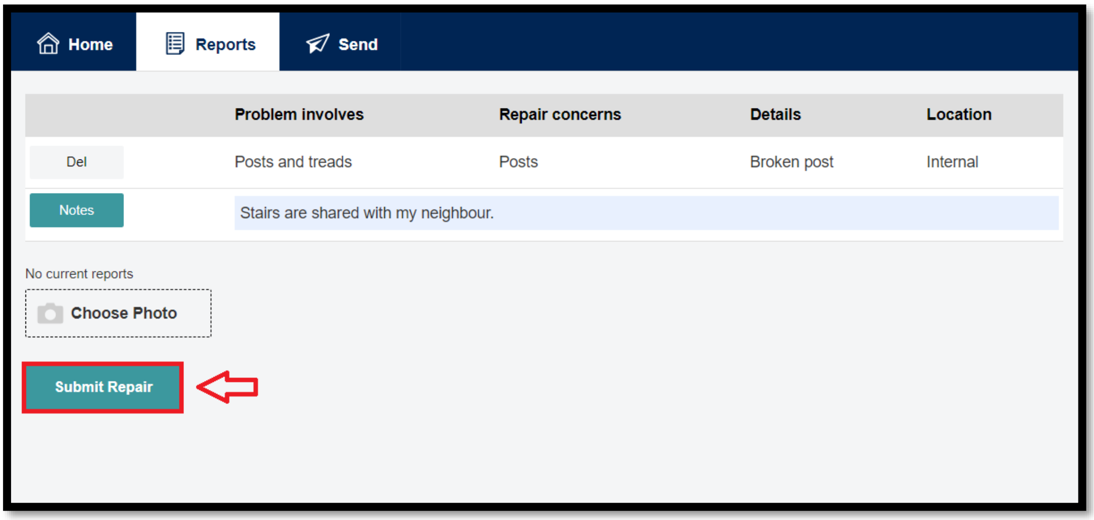


6. **Select a location for the repair and answer any additional questions that may assist the repair operative.** Select the **Make Report** button to add the repair to your repair report. You will not be able to select a location, answer questions or add comments if you have not elected to display these options in the M3Central Control Panel. Refer to the Settings section for more information on how to show or hide these options.



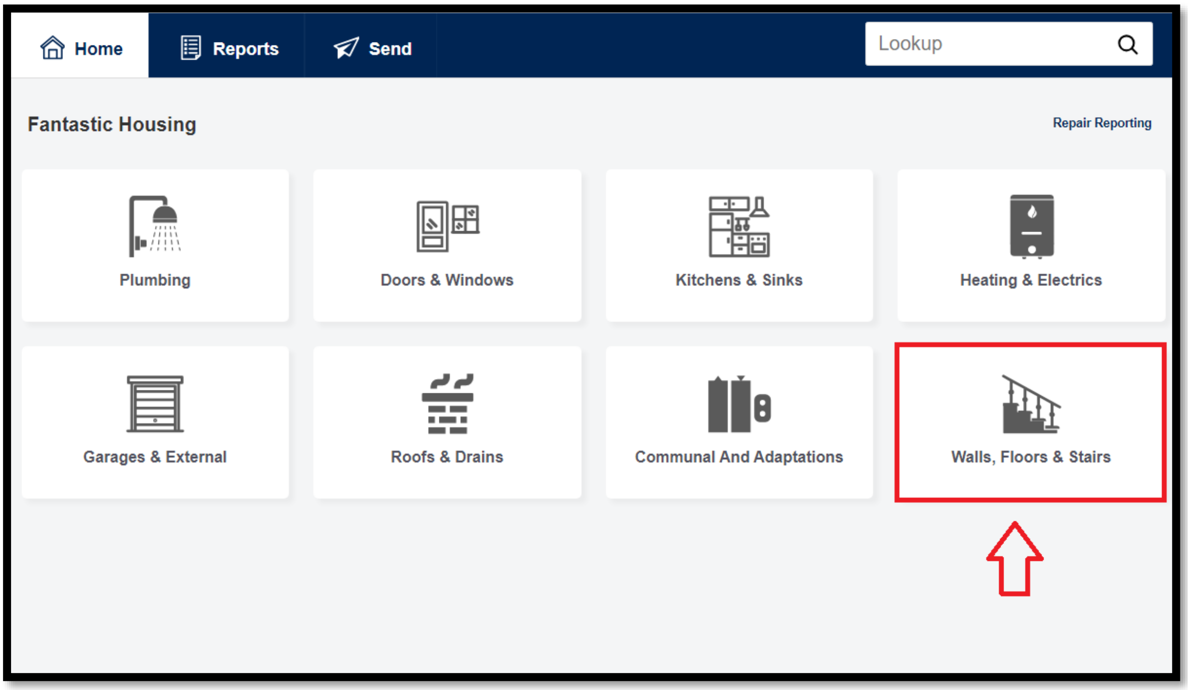
7. **Review your repair problems.** You can add photos by selecting the **Choose Photo…** button. You can edit the comments for a repair by selecting the **Notes** button. Refer to the Settings section for more information on how to enable or disable the ability to add photos.

   You can add more than one repair. Select the Home tab to raise more repairs. Once you are ready to send the repairs select the **Next** button or **Send** tab.

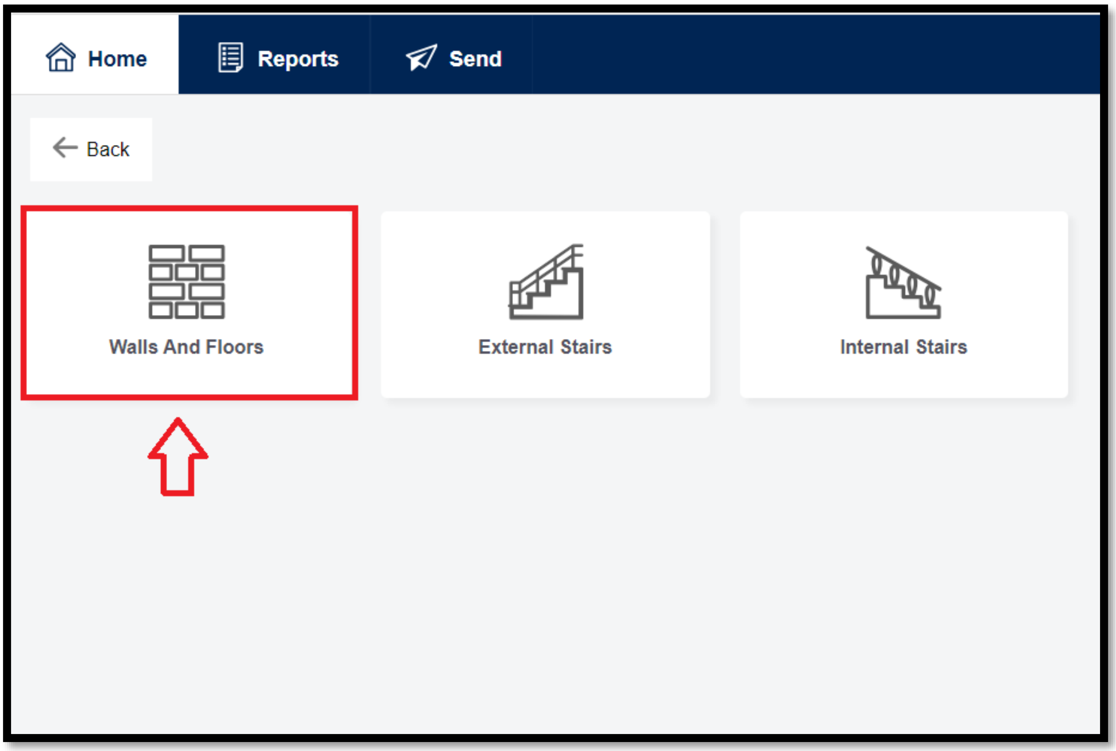


Reporting Damp/Mould using the graphics (M3Central Reporting)

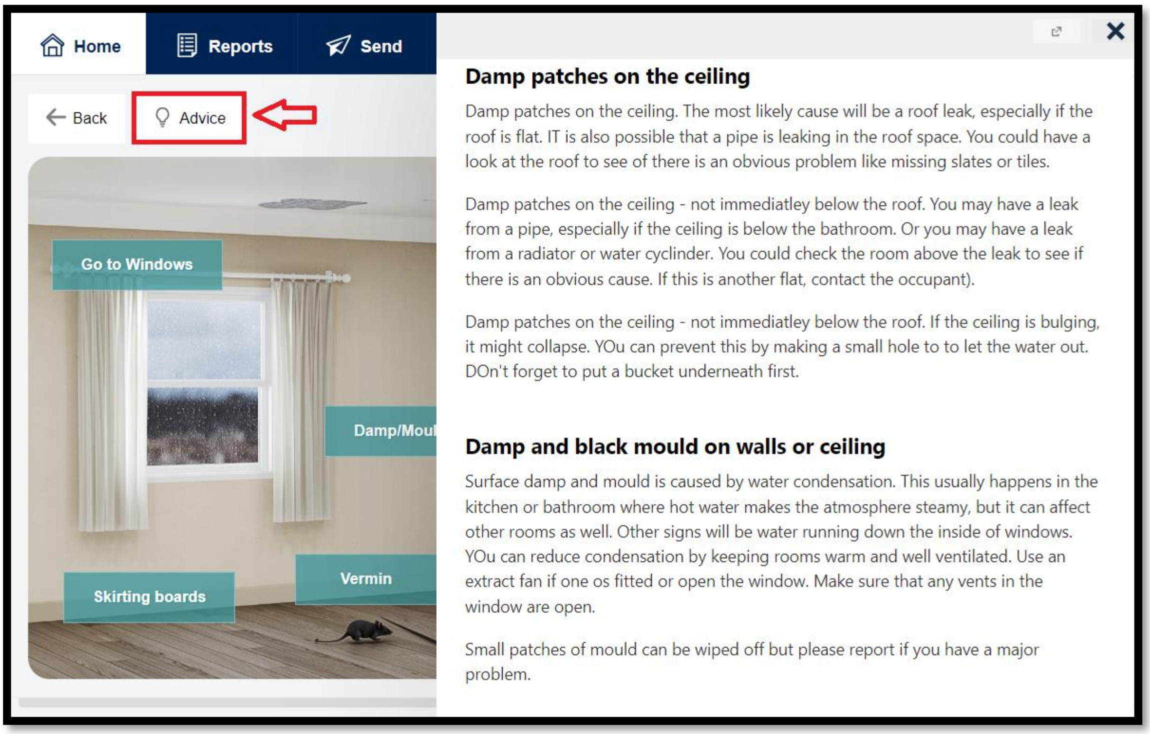
1. **Select the group that covers the damp/mould.** In this case, you would select the **Walls, Floor & Stairs** group.



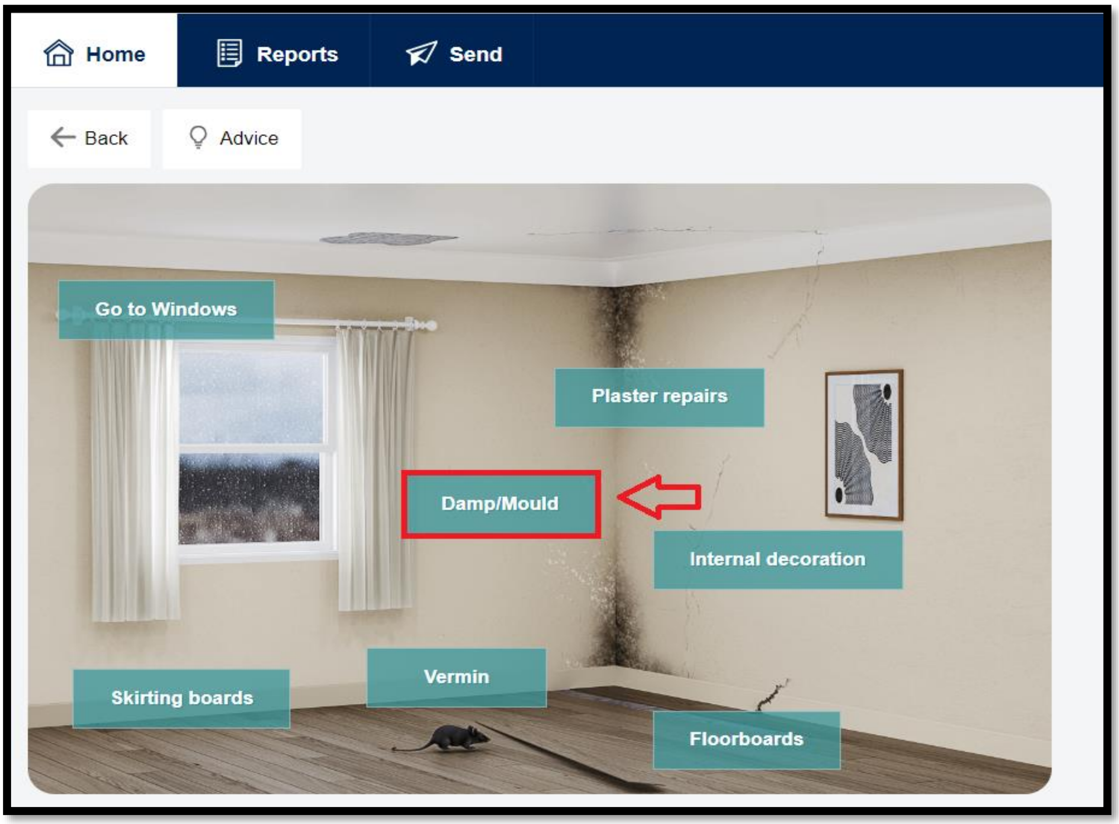
2. **The damp/mould category of repair is in Walls and Floors.** You would select the **Walls and Floors** category.



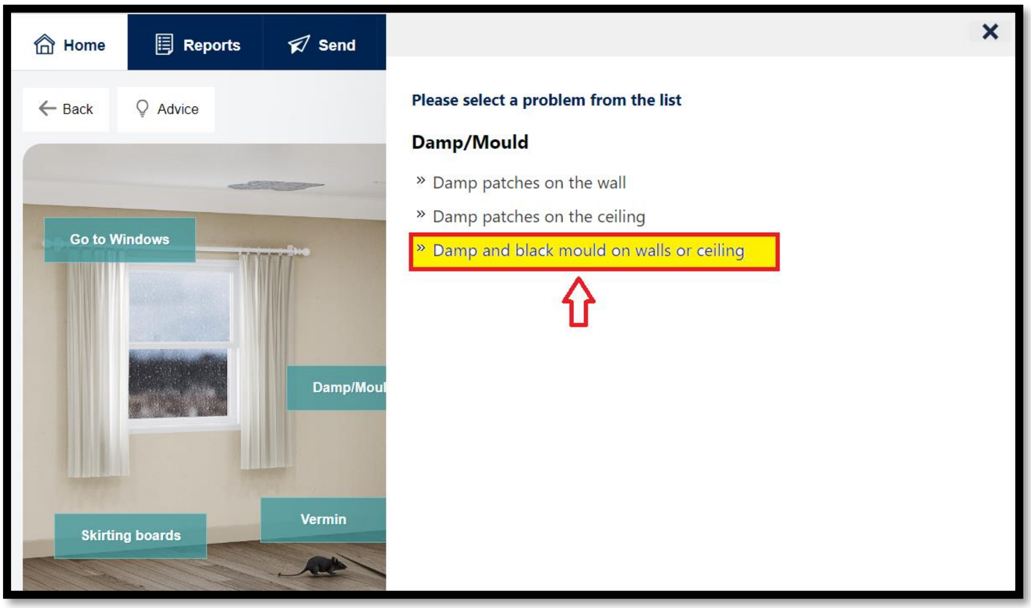
3. **Optional: Select the Advice button to view advice.** This opens a window with advice relevant to repair category you selected. Refer to the Editing Advice section for more information on how to edit the advice text.



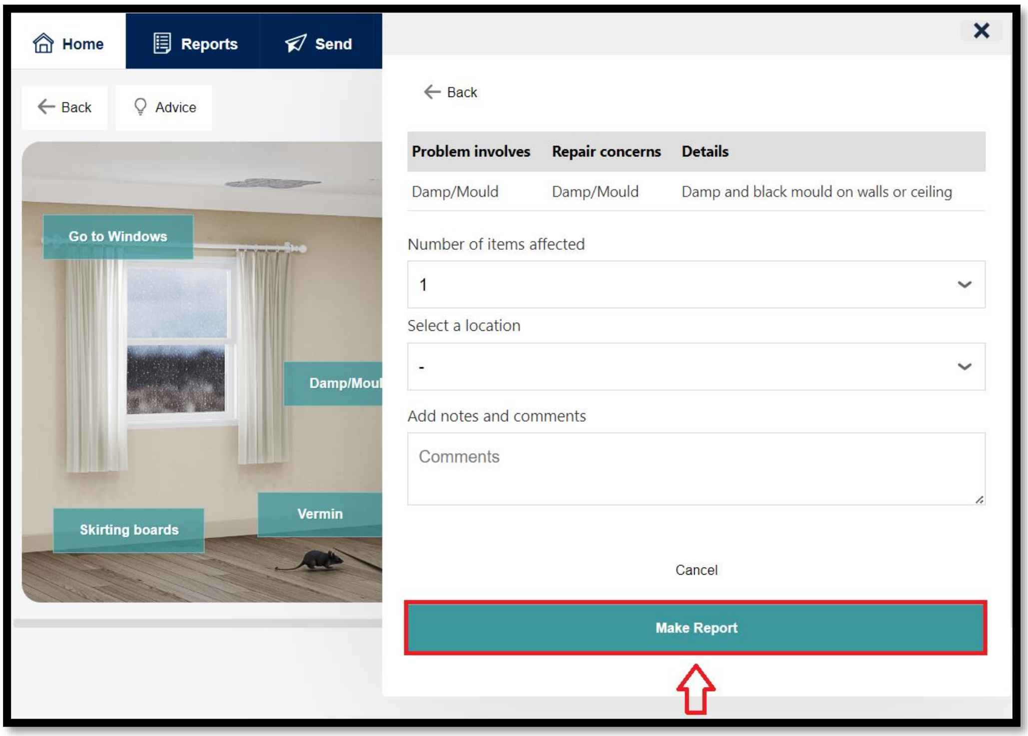
4. **Select the relevant repair area.** In this case you would select the **Damp/Mould** repair area.



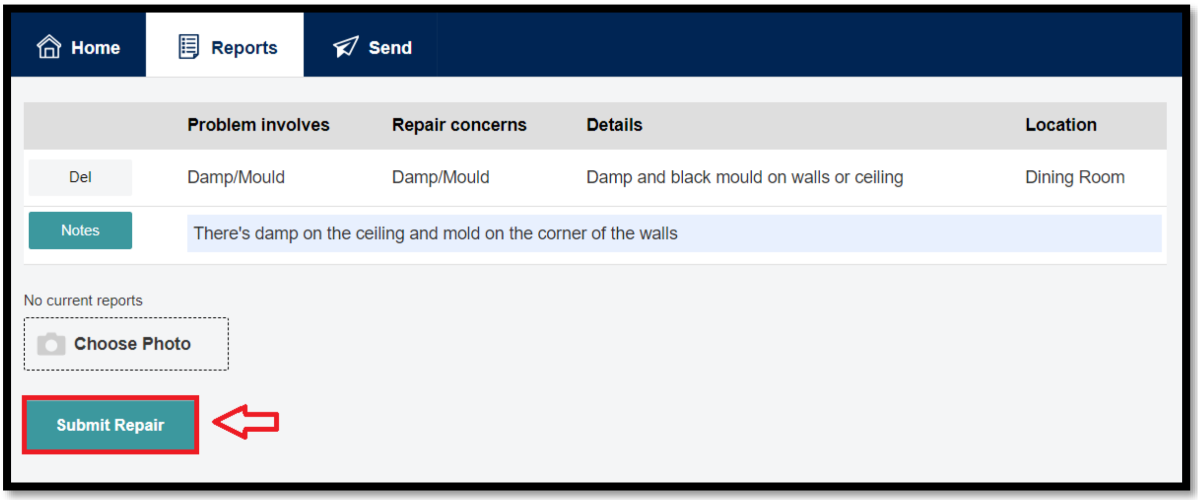
5. **Select the problem that best describes the repair you want to report.** In this case you would select **Damp and Black Mould on walls or ceiling**.
   If you can't see the problem you want to report, select **Can't find the problem you want to repair?** This opens a window where you can manually type in a description of the problem, or select a suggested page that might include the problem you want to report.



6. **Select a location for the repair and answer any additional questions that may assist the repair operative.** Select the **Make Report** button to add the repair to your repair report. You will not be able to select a location, answer questions or add comments if you have not elected to display these options in the M3Central Control Panel. Refer to the Settings section for more information on how to show or hide these options.



7. **Review your repair problems.** You can add photos by selecting the **Choose Photo…** button. You can edit the comments for a repair by selecting the **Notes** button. Refer to the Settings section for more information on how to enable or disable the ability to add photos. You can add more than one repair. Select the Home tab to raise more repairs. Once you are ready to send the repairs select the **Next** button or **Send** tab.

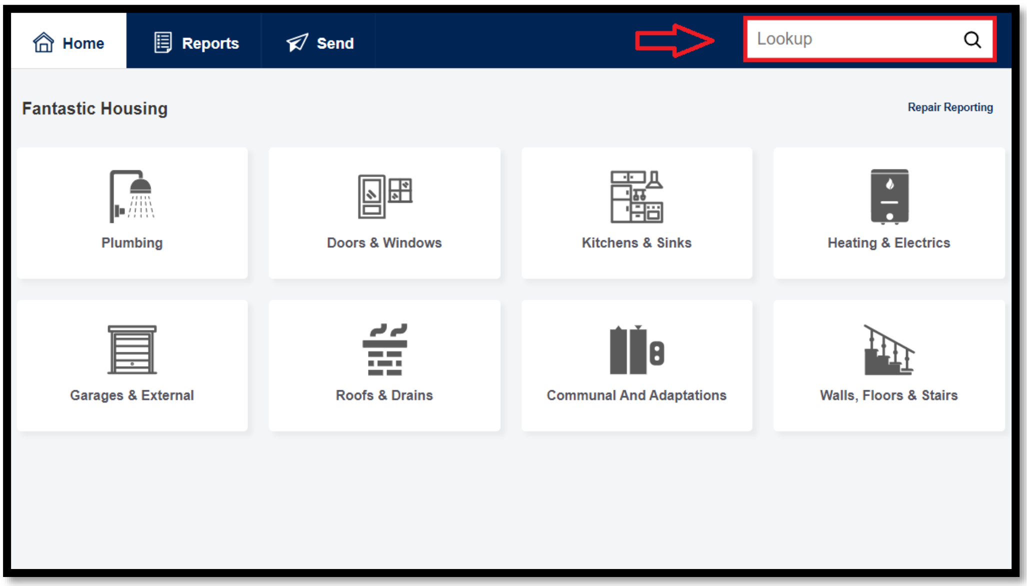


Reporting repairs using Lookup

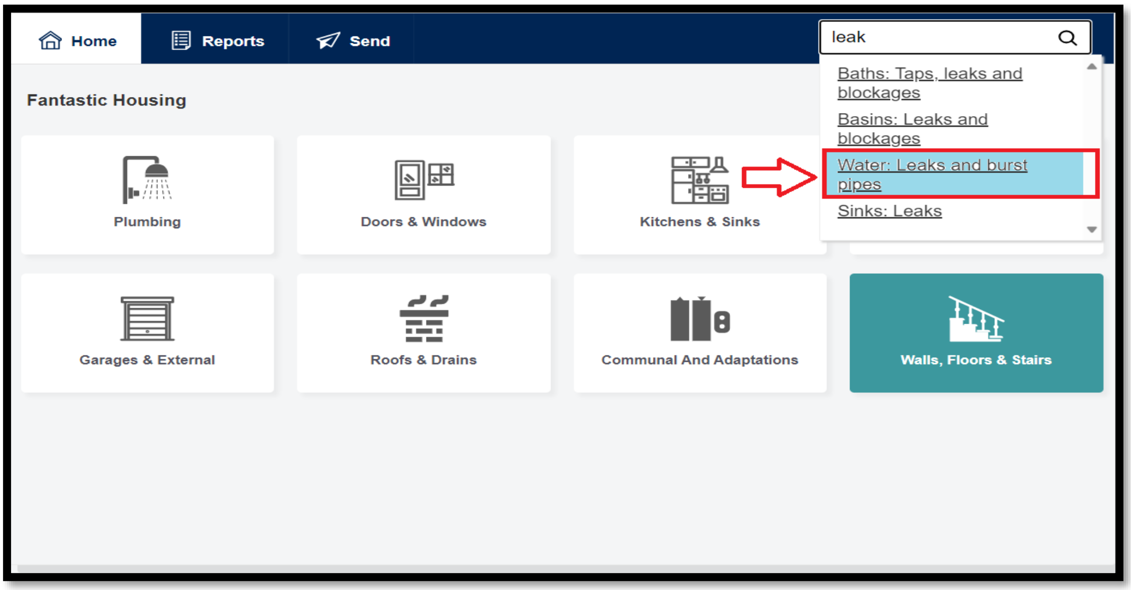
The Lookup feature provides an effective way to search for a repair problem when you are unsure which group or category the repair would fall under.

This section assumes that you want to report a water leak from the empty flat above you.

1. **Start typing the repair problem in the Lookup field on the M3Central home page.** As you type, suggested categories will appear in the drop-down list of results. In this case you would type 'leak'.

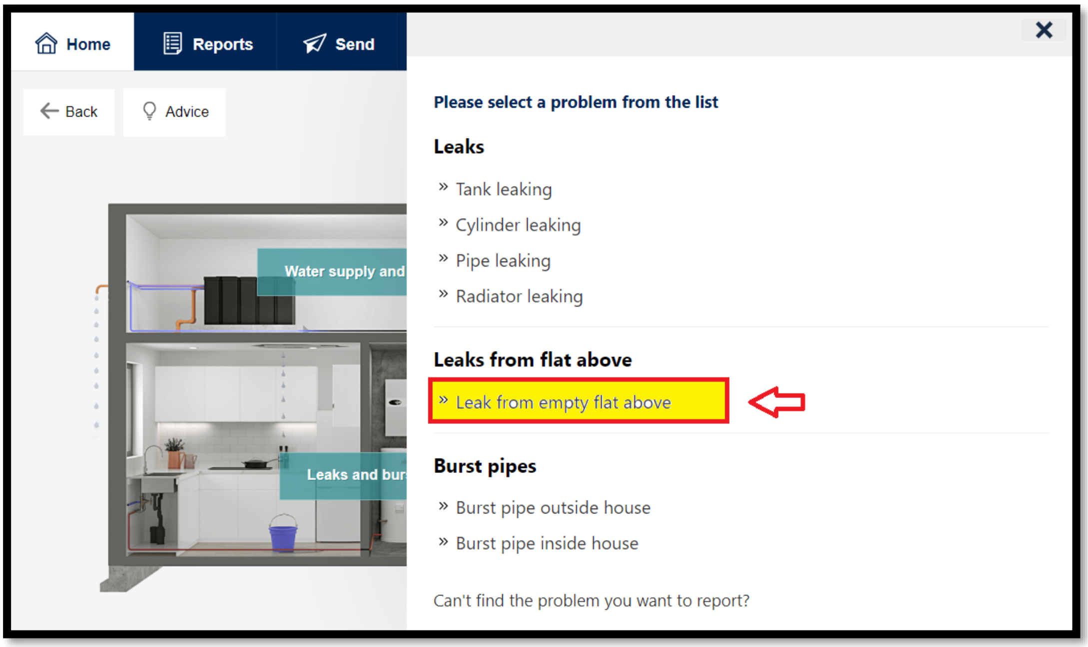


2. **Select the category that best describes the repair problem from the drop-down list.** This will redirect you to the correct page in M3Central and display a list of problems. In this case you would select **Water: Leaks**.

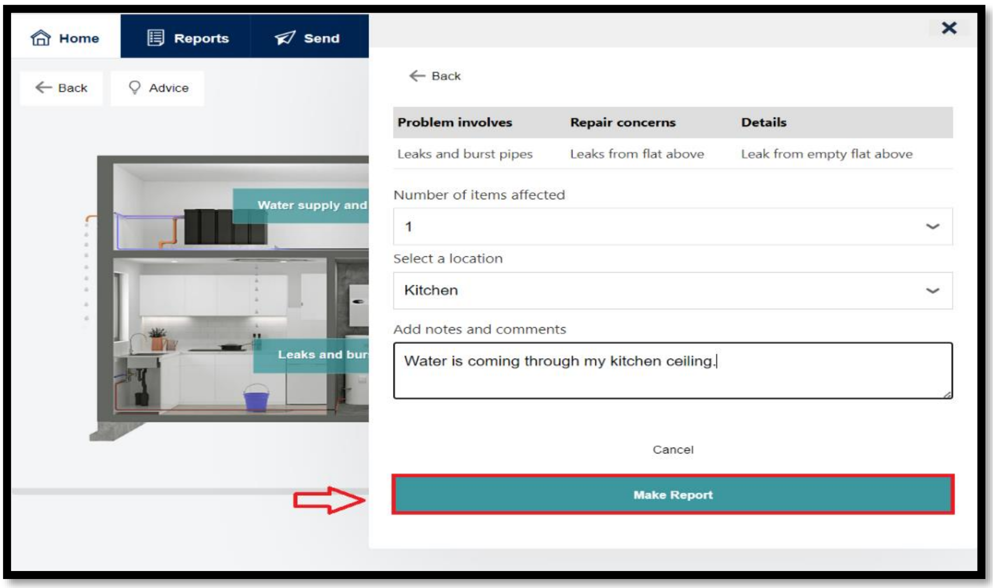


3. **Select the problem that best describes the repair you want to report.** In this case you would select **Leak from empty flat above**.

   If you can't see the problem you want to report, select **Can't find the problem you want to repair?** This opens a window where you can manually type in a description of the problem, or select a suggested page that might include the problem you want to report.

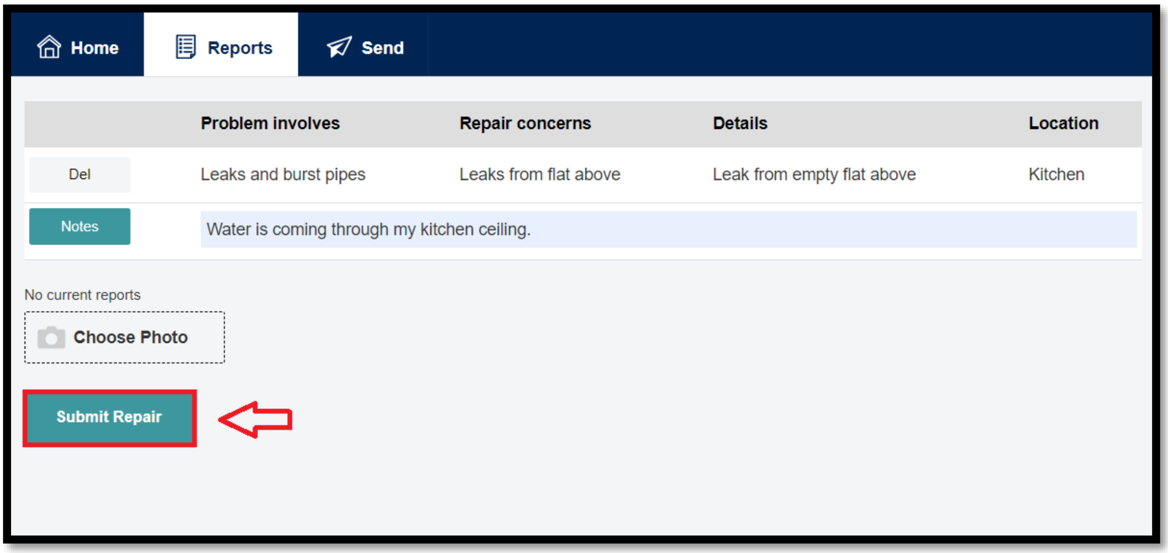


4. **Select a location for the repair and add any additional comments that may assist the repair operative.** Select the **Make Report** button to add the repair to your repair report. You will not be able to select a location or add comments if you have not elected to display these options in the M3Central Control Panel. Refer to the [Settings](#) section for more information on how to show or hide these options.

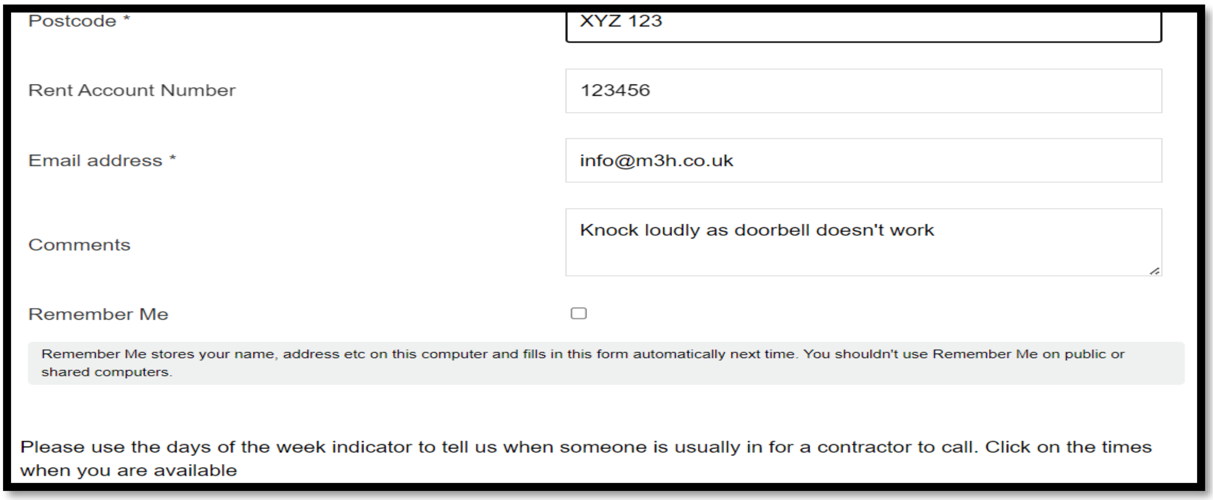


5. **Review your repair problems.** You can add photos by selecting the **Choose Photo…** button. You can edit the comments for a repair by selecting the **Notes** button. Refer to the Settings section for more information on how to enable or disable the ability to add photos.

   You can add more than one repair. Select the Home tab to raise more repairs. Once you are ready to send the repairs select the **Next** button or **Send** tab.



6. **Enter your personal information and access details into the user information form.** You will not see this form if you are accessing the M3Central interface through a portal, or if M3Central is directly integrated with your housing management system. Once you have entered the required information, send the repair report by selecting the **Send** button. Refer to the Editing the User Information Form (Reporting mode) section for more information on how to make changes to the form.



Postcode * XYZ 123

Rent Account Number 123456

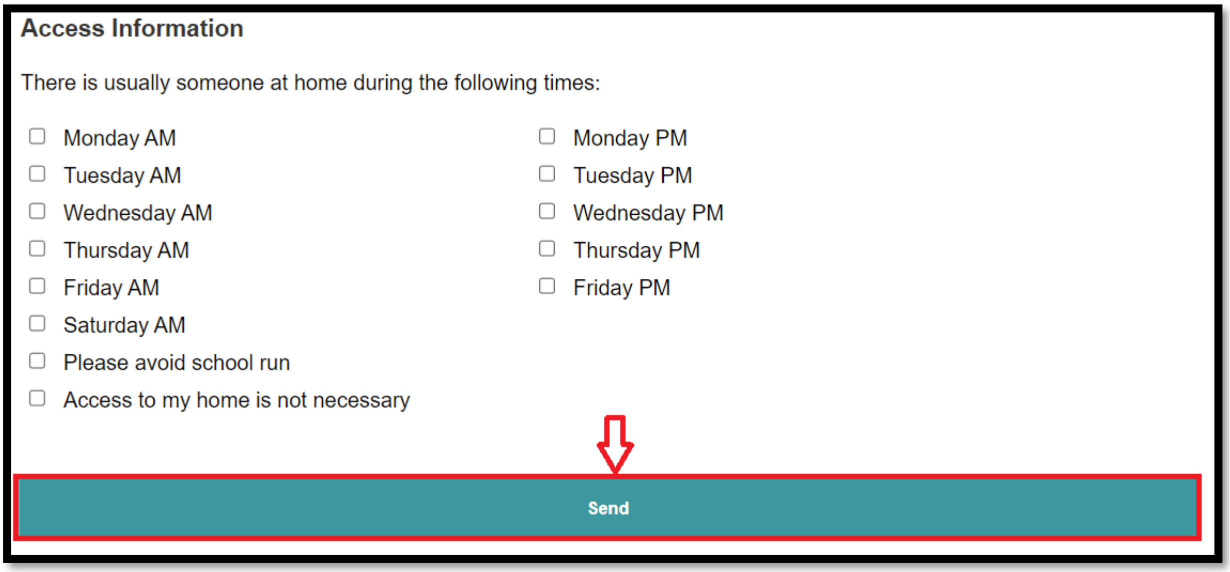
Email address * info@m3h.co.uk

Comments Knock loudly as doorbell doesn't work

Remember Me

Remember Me stores your name, address etc on this computer and fills in this form automatically next time. You shouldn't use Remember Me on public or shared computers.

Please use the days of the week indicator to tell us when someone is usually in for a contractor to call. Click on the times when you are available



Access Information

There is usually someone at home during the following times:

- Monday AM
- Tuesday AM
- Wednesday AM
- Thursday AM
- Friday AM
- Saturday AM
- Please avoid school run
- Access to my home is not necessary
- Monday PM
- Tuesday PM
- Wednesday PM
- Thursday PM
- Friday PM

Send

7. **If possible, make a note of the repair request reference number on the confirmation page (this may be hidden)**. Select the **Send me a copy** button to have a copy of the report sent to your email address. If you plan on raising more repairs, select the **Clear** button to clear the screen.

Diagnosing a repair

M3Central can be used to diagnose repairs and accurately allocate Schedule of Rates items. It provides multiple ways for a user to diagnose repairs using graphics, word searches, topics searches and code lookups. Once repair problems have been diagnosed, the Scheduler can be used to send the repairs to your housing management system.

When M3Central displays the Schedule of Rates item it will include the (1) code; (2) priority; (3) short description; (4) medium description; (5) units of measurement; and (6) associated rate.

If you are using the M3NHF Schedule of Rates, the default priorities and units of measurement are as follows:

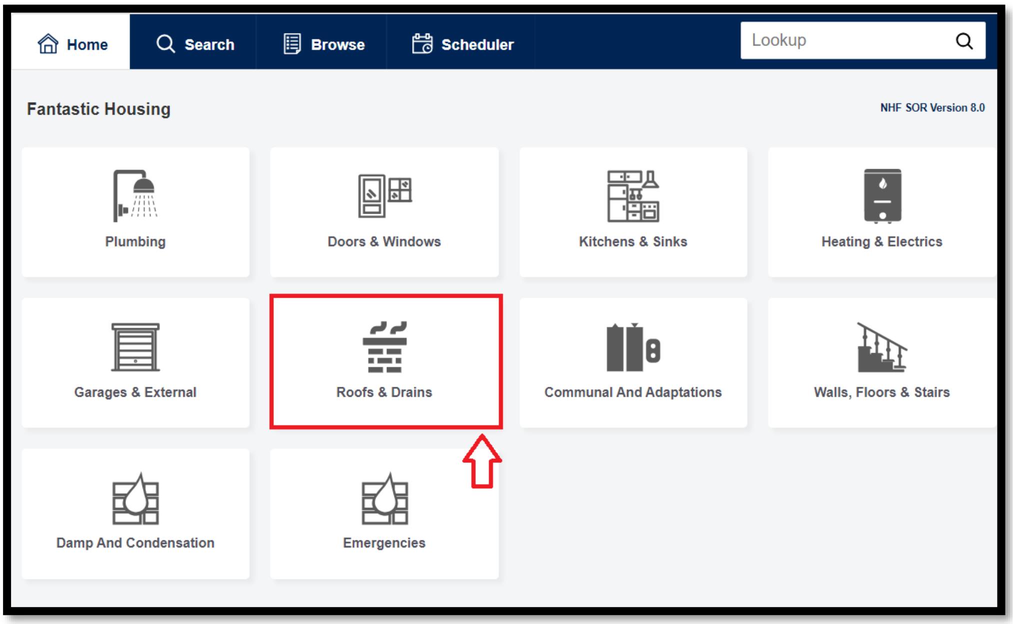
Priority	Meaning	Units of meas.	Meaning
R	Routine	NO	Number
U	Urgent	IT	Items
E	Emergency	SM	Square metres
X	User defined	LM	Linear metres

Diagnosing repairs using the graphics

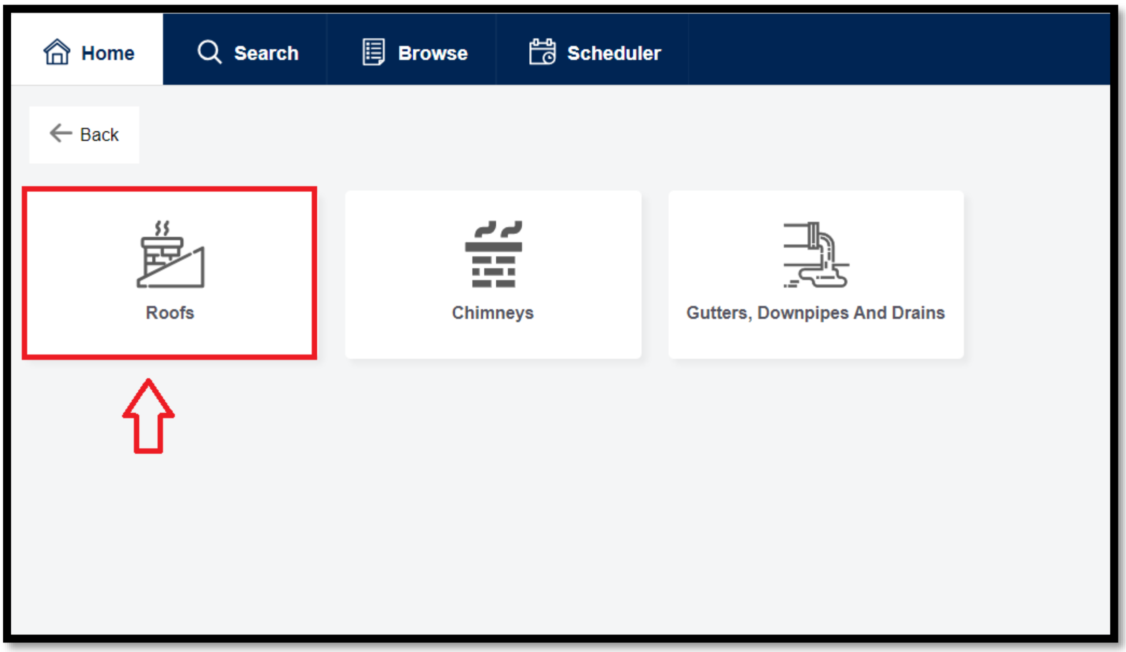
M3Central provides a graphical interface to help non-technical staff quickly and easily diagnose repair problems. On the M3Central home page you will see approximately eight images that represent different groups of repairs. The number of images you see may vary depending on which groups you have elected to display in the Control Panel. Refer to the Editing Repair Problems section for more information on how to hide repair problems.

This section assumes that a tenant has reported that approximately 15 plain roof tiles fell off the roof and broke after a storm during the night.

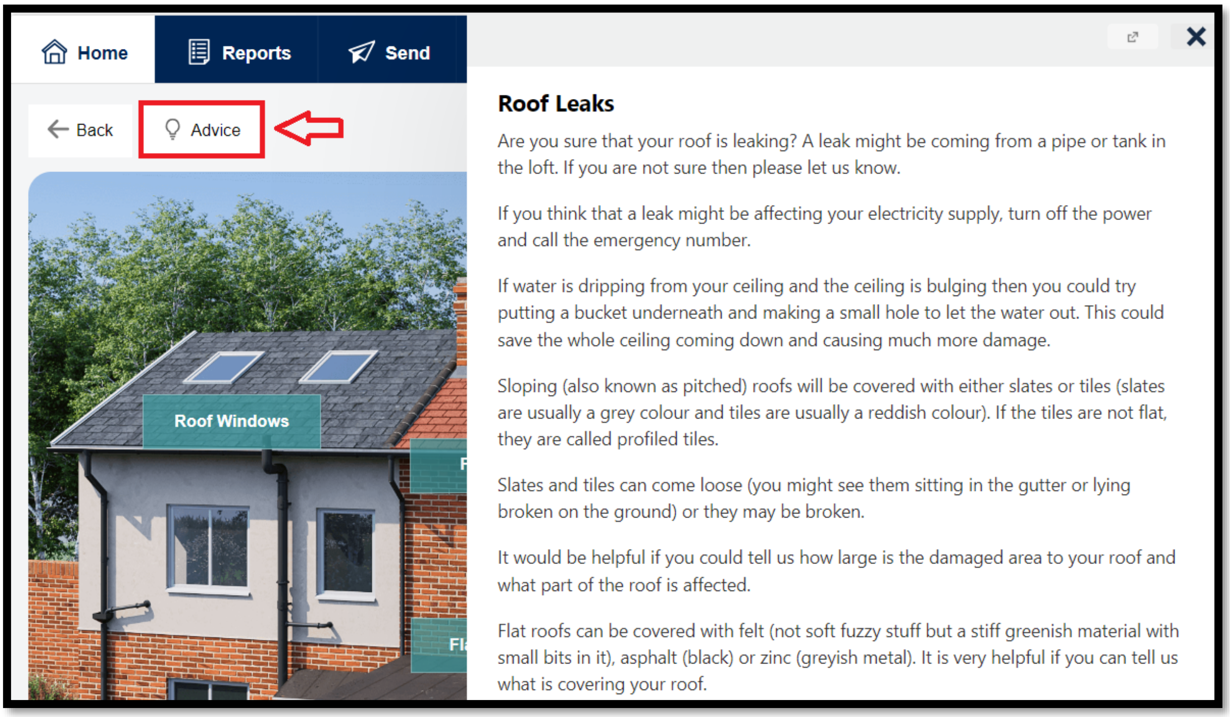
1. **Select the group that covers the repair you want to report.** In this case you would select the **Roofs & Drains** group.



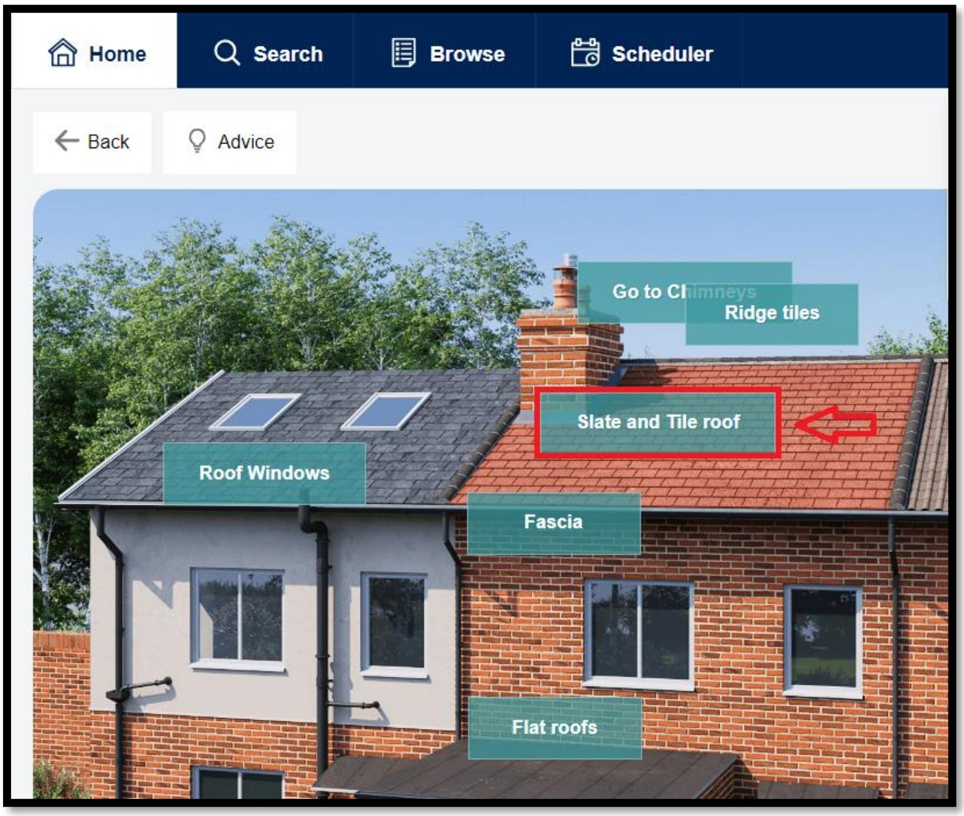
2. **Select the category of the repair you want to report.** In this case you would select the **Roofs** category.



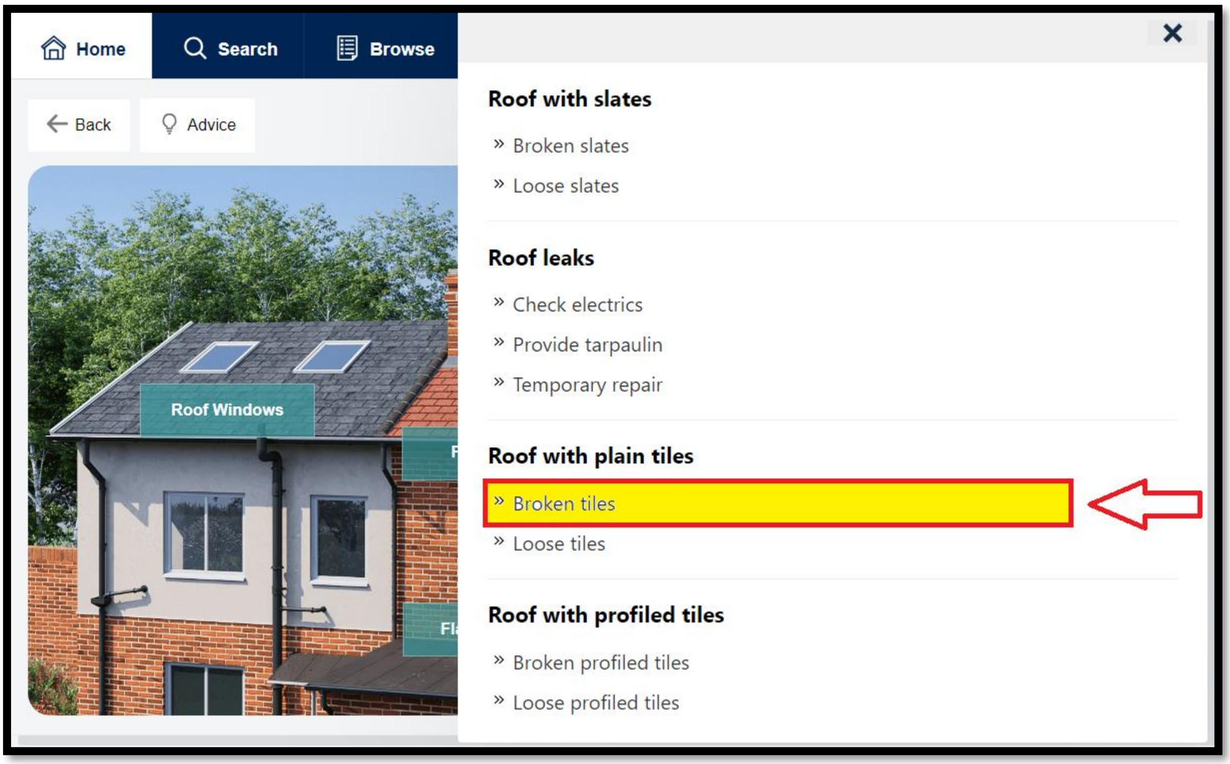
3. **Optional: Select the Advice button to view advice.** This opens a window with advice relevant to repair category you selected. Refer to the Editing Advice section for more information on how to edit the advice text.



4. **Select the relevant repair area.** In this case you would select the **Slate and Tiled roof** repair area.



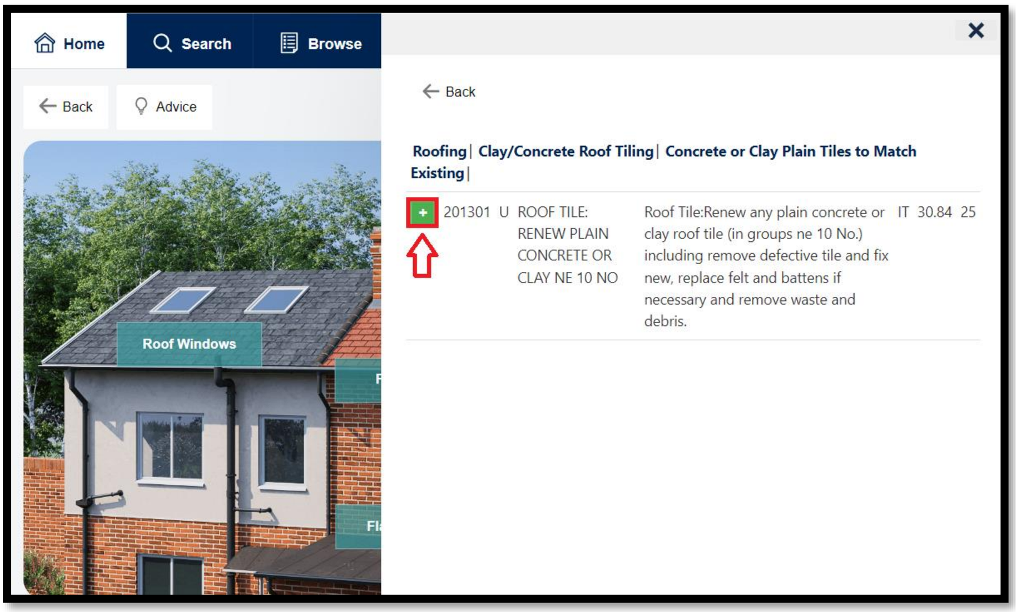
5. **Select the problem that best describes the repair you want to report.** In this case you would select **Broken tiles**.



6. **Identify the correct Schedule of Rates item.** After you select a problem a window will open with one or more suggested Schedule of Rates items.

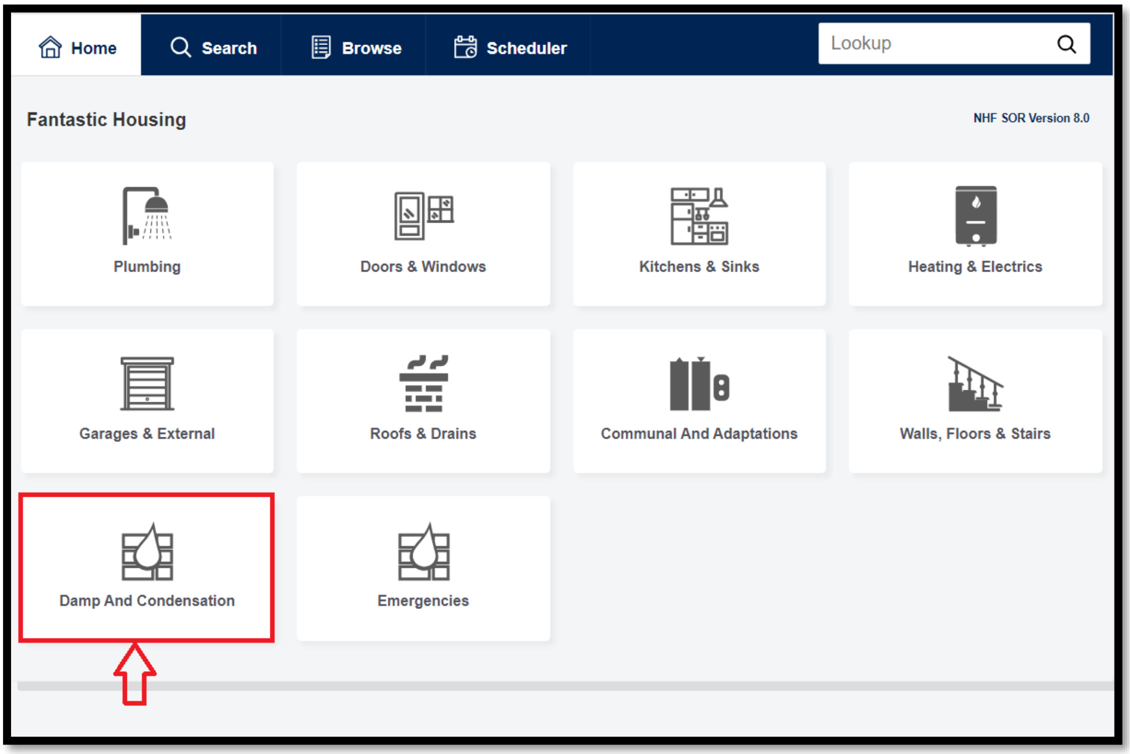
   If you do not see the correct item, use the 'breadcrumbs' at the top of the window to go up one or more levels. In this case the given item (code 201301) covers replacement of up to 10 plain concrete or clay tiles. However, 15 tiles were broken. If you use the 'breadcrumbs' and select **Concrete or Clay Plain Tiles to Match Existing** you will see more items that you can choose. In this case you may prefer code 201303, which covers replacement of plain concrete or clay tiles in groups over 10 by square metre.

7. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Once you have finished diagnosing repairs, they can be sent to your housing management system from the Scheduler. Refer to the Using the Scheduler to send items section for more information on how to use the Scheduler.

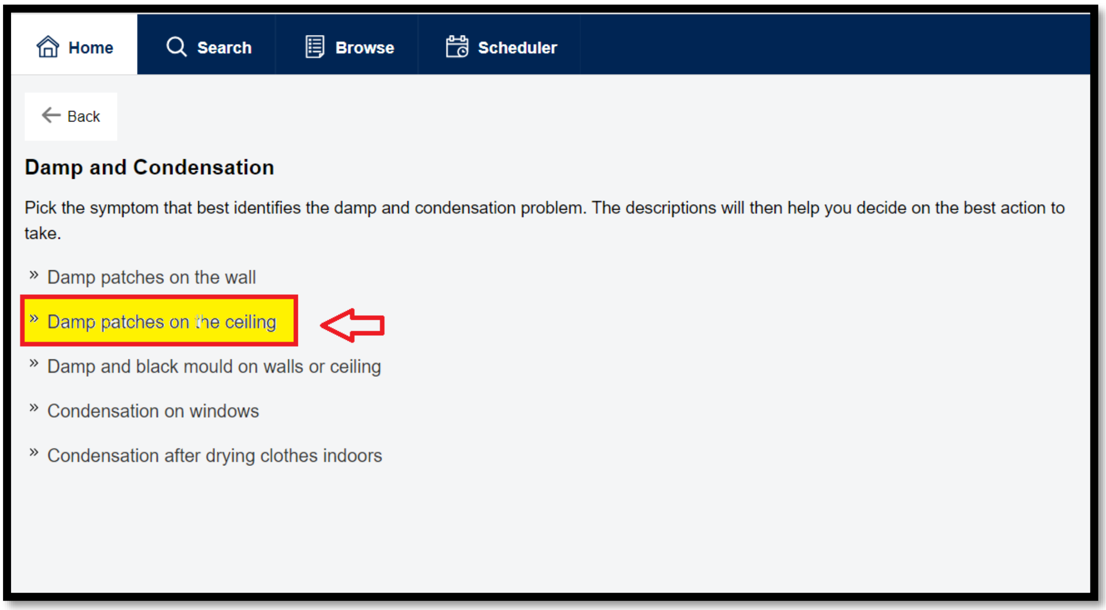


Diagnosing Damp/Mould using the graphics (M3Central Diagnostics)

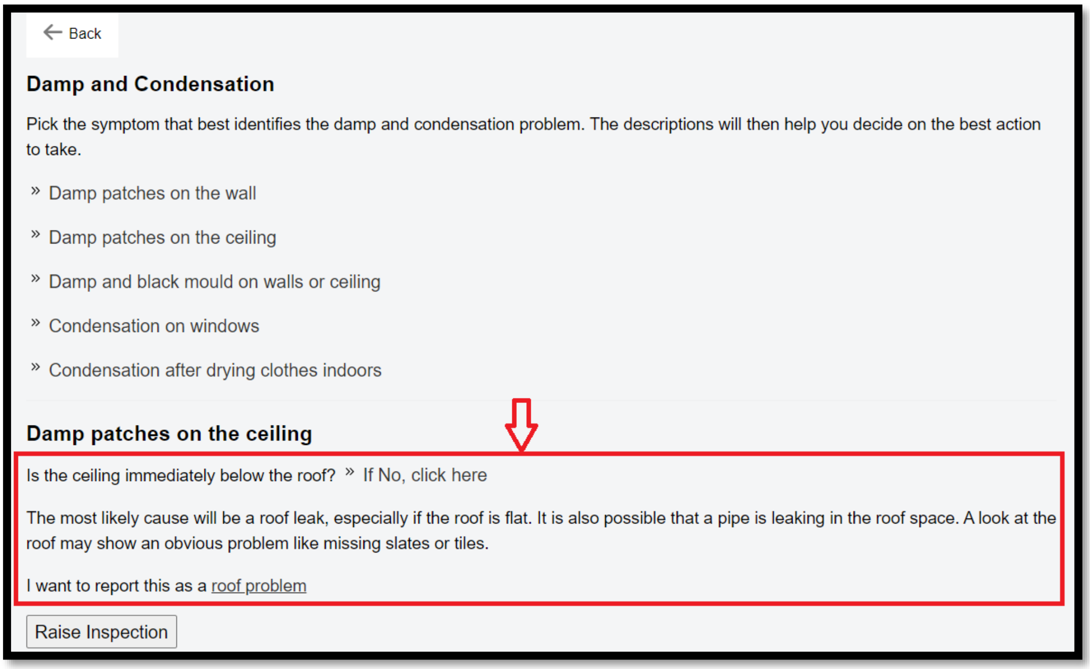
1. **Select the group that covers the repair you want to report.** In this case, you would select the **Damp and Condensation** group.



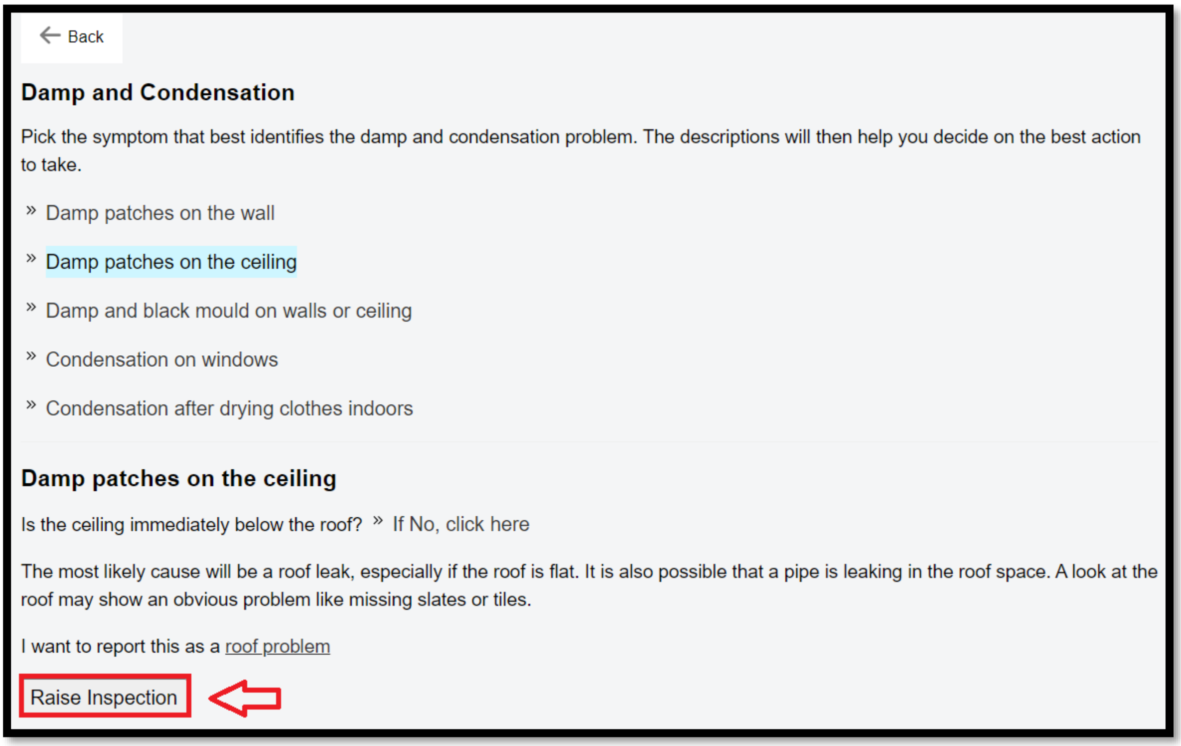
2. **Select the relevant repair area.** In this case you would select the **Damp patches on the ceiling** repair area.



3. **Optional:** When you raise this, we recommend referencing the highlighted default advice section. Refer to the Editing Advice section for more information on how to edit the advice text.

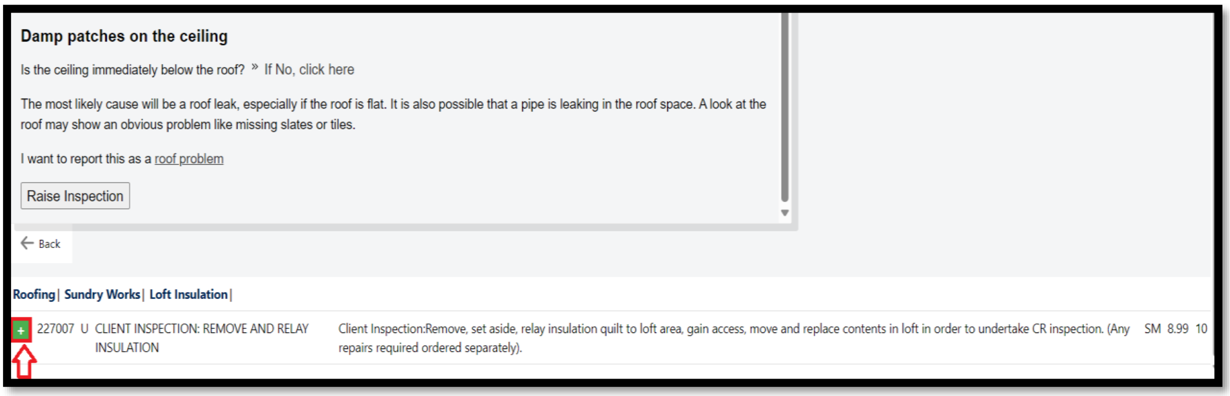


4. **Select the Raise Inspection option.**



5. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Once you have finished diagnosing repairs, they can be

sent to your housing management system from the Scheduler. Refer to the Using the Scheduler to send items section for more information on how to use the Scheduler.

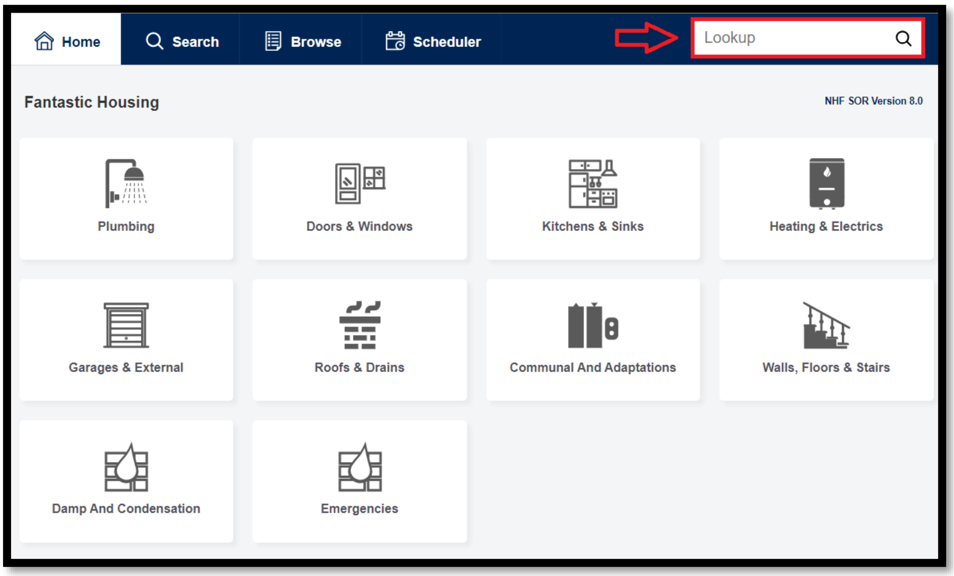


Diagnosing repairs using Lookup

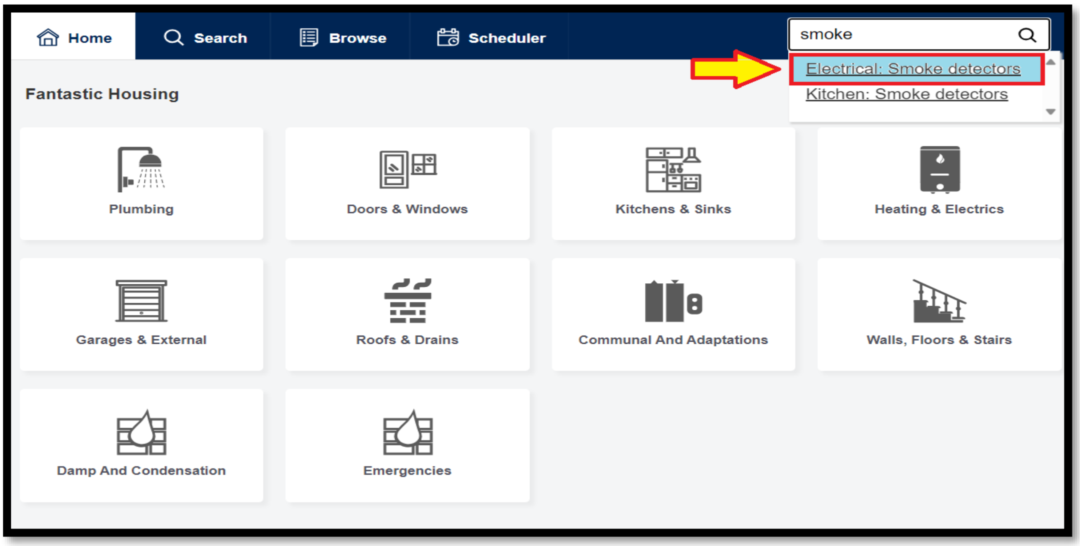
The **Lookup** feature provides an effective way to diagnose a repair problem when you are unsure which group or category the repair would fall under.

This section assumes that a tenant has reported a faulty smoke detector.

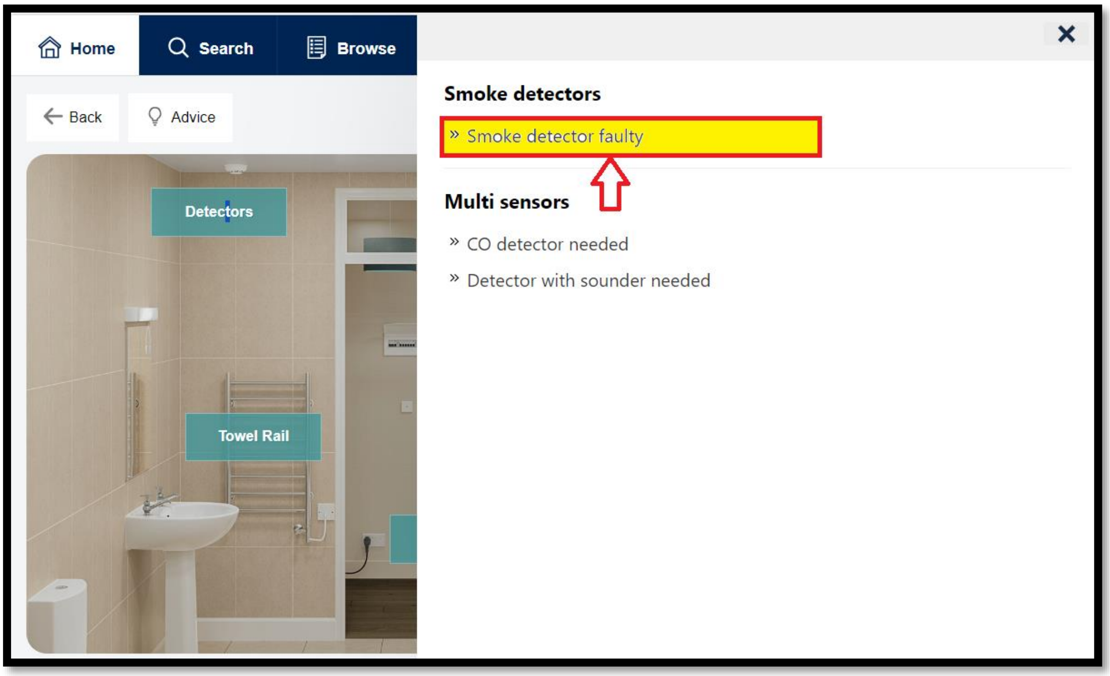
1. **Start typing the repair problem in the Lookup field on the M3Central home page.** As you type suggested categories will appear in the drop-down list of results. In this case you would type 'smoke'.



2. **Select the category that best describes the repair problem from the drop-down list.** This will redirect you to the correct page in M3Central and display a list of problems. In this case you would select **Electrical: Smoke detectors**.



3. **Select the problem that best describes the repair you want to report.** In this case there is only one option, and you would select **Smoke detector faulty**.

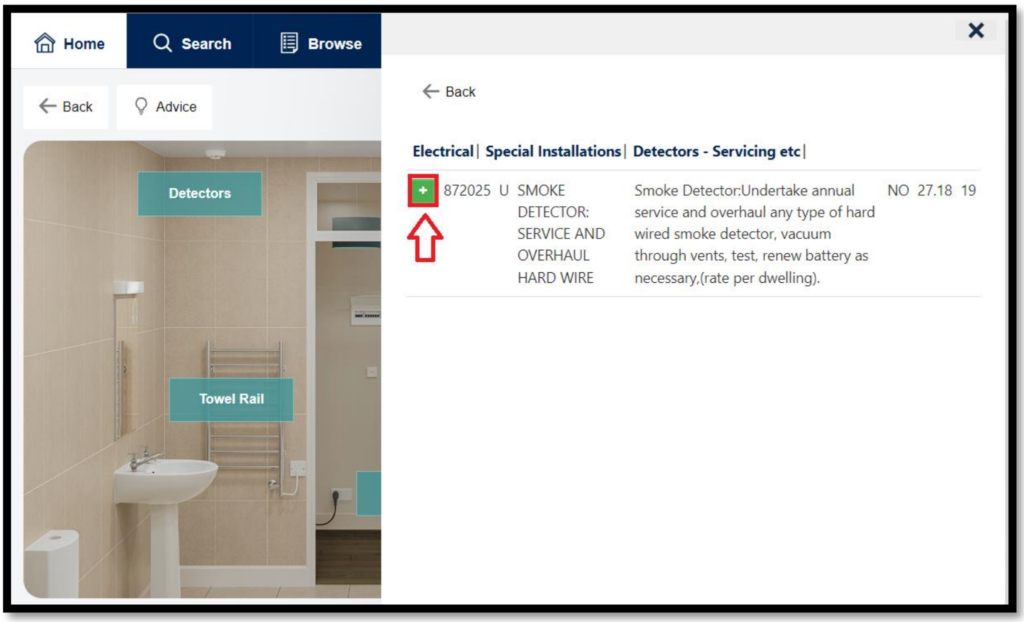


4. **Identify the correct Schedule of Rates item.** After you select a problem a window will open with one or more suggested Schedule of Rates items.

   If you do not see the correct item, use the 'breadcrumbs' at the top of the window to go up one or more levels. In this case you could select **Smoke Detectors** or **Special Installations** to search for more appropriate items. Needed?

5. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Once you have finished diagnosing repairs, they can be sent to

your housing management system from the Scheduler. Refer to the Using the Scheduler to send items section for more information on how to use the Scheduler.

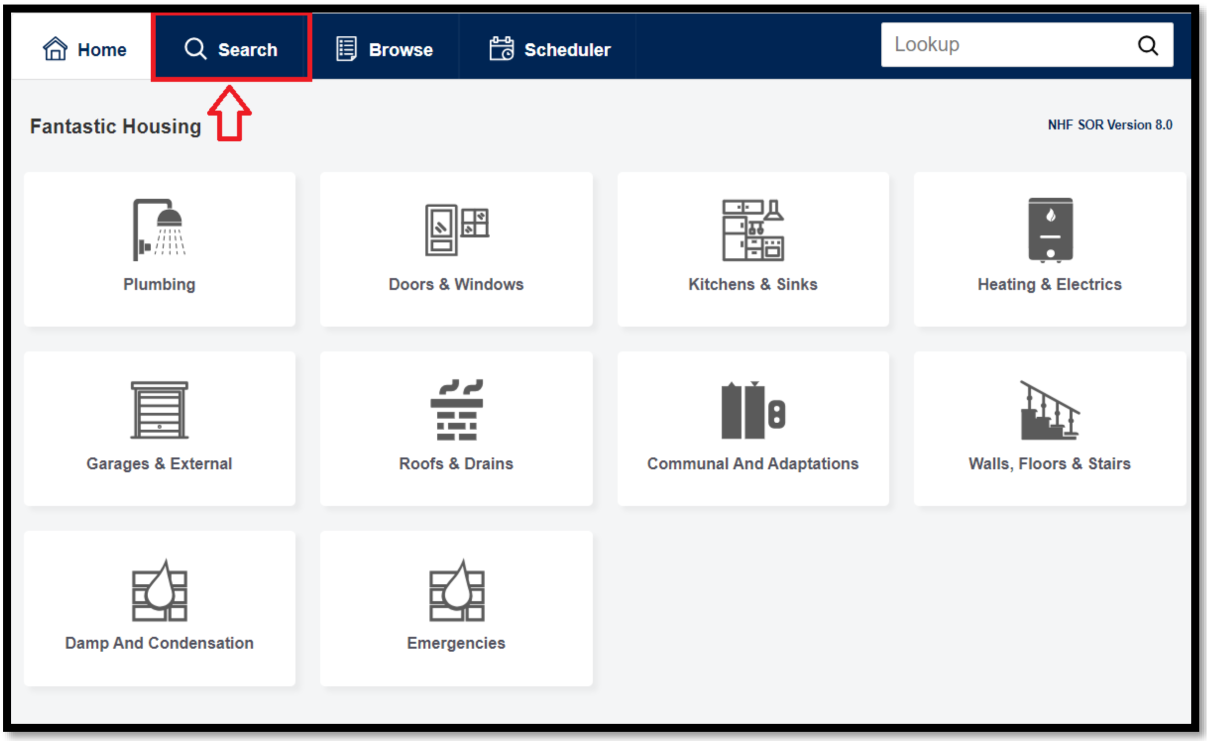


Using the Search tab

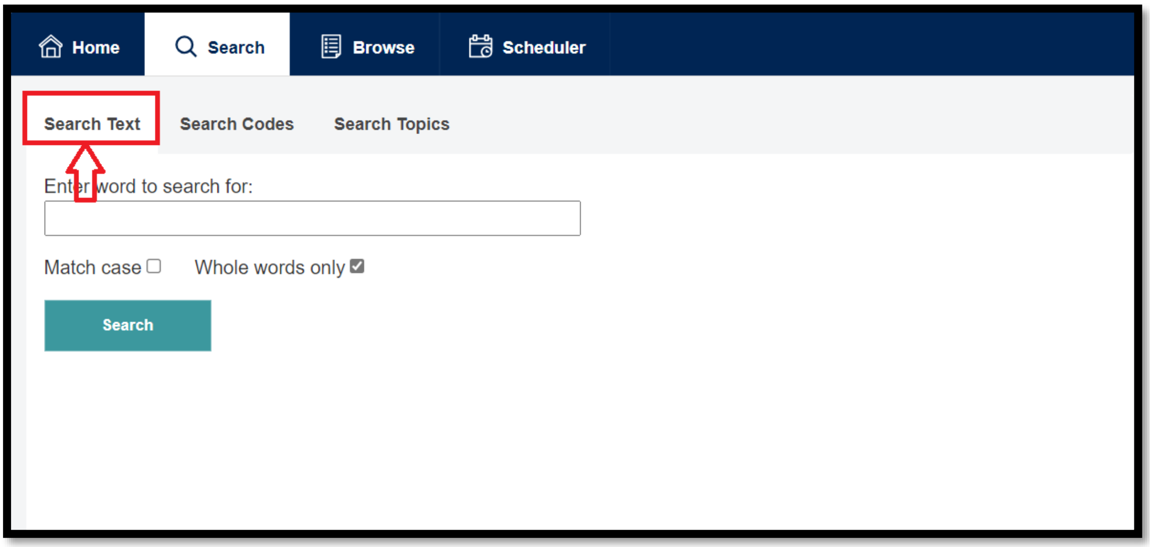
Diagnosing repairs using the text search

Items can be identified by doing a standard word search of the short and medium descriptions of the underlying Schedule of Rates. This feature can be useful, but has some limitations. The steps below will demonstrate the pros and cons of doing a text search.

1. Select the Search tab.

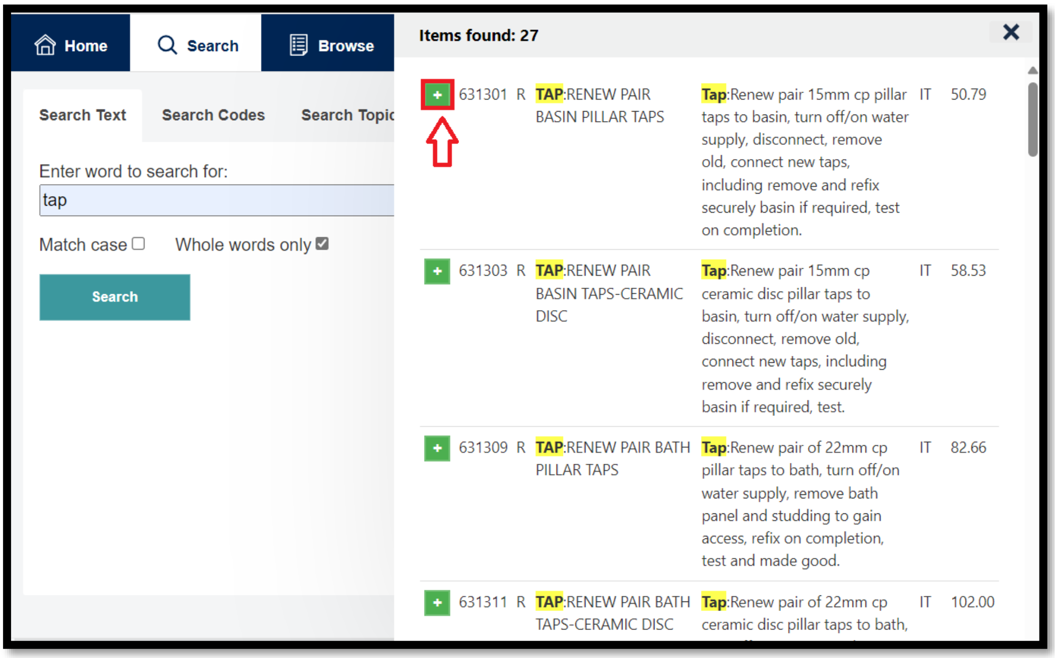


2. Select the Search Text heading.



3. **Enter the word to search for and select the Search button.** To improve the effectiveness of the search, you should be as specific as possible. For example, if you are using the M3NHF Schedule of Rates and search for the word 'tap', the results will display more than 70 codes, very few of which are relevant. This is because the search has picked up every instance of the word tap. The results can be improved by using the plural 'taps', or by ensuring that **Whole words only** is checked. The results will display a list of suggested Schedule of Rates items.

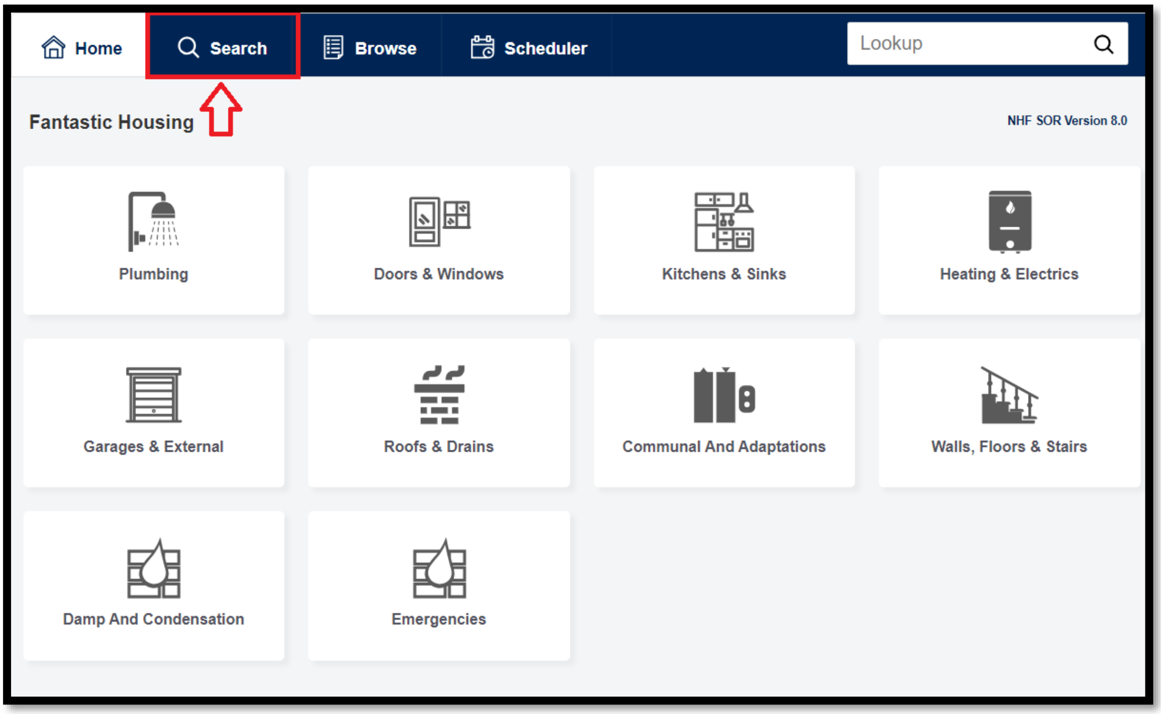
4. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Once you have finished diagnosing repairs, they can be sent to your housing management system from the Scheduler. Refer to the Using the Scheduler to send items section for more information on how to use the Scheduler.



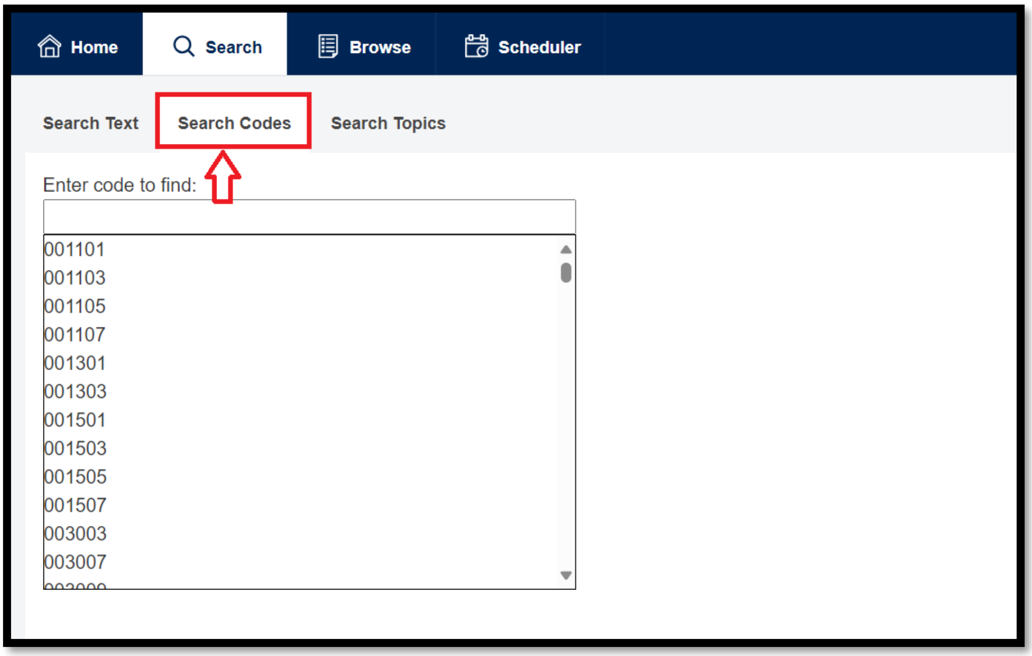
Diagnosing repairs using the code search

If you know the code of the Schedule of Rates item you are looking for, you can lookup that code directly in M3Central. For example, someone in the accounts department may want to query the Schedule of Rates item on an invoice from a contractor. This feature may also be useful if the same repair is commonly reported, and the user already knows the code.

1. Select the Search tab.



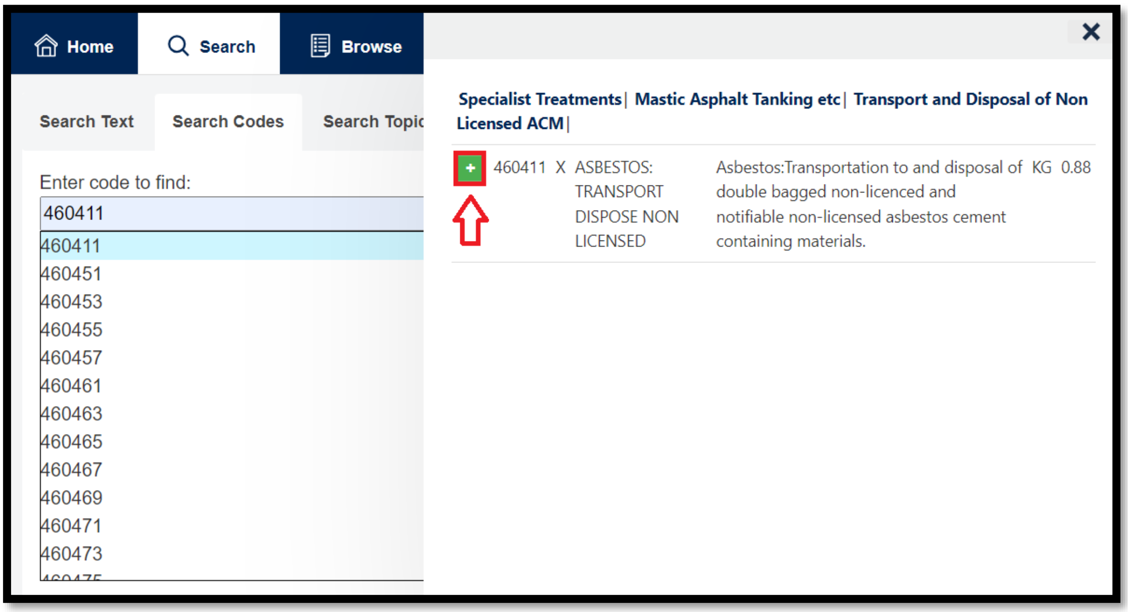
2. **Select the Search Codes heading.**



3. **Enter the code you want to find.** The window will automatically scroll to the code you entered. Double click on the code to view its details.

   You can use the 'breadcrumbs' at the top of the window to go up one or more levels and look for additional related items.

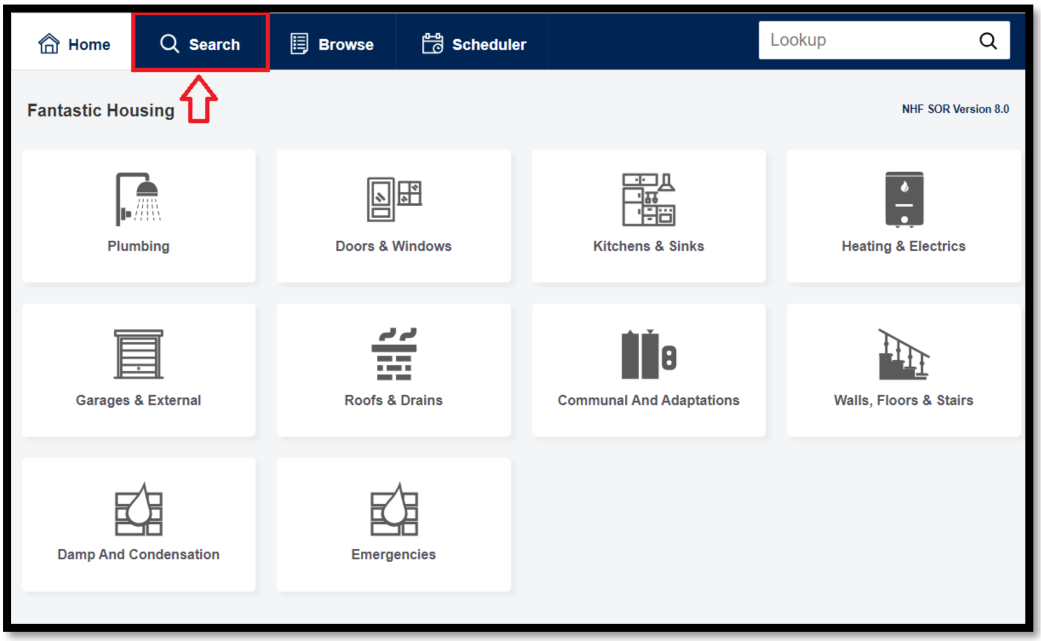
4. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Once you have finished diagnosing repairs, they can be sent to your housing management system from the Scheduler. Refer to the Using the Scheduler to send items section for more information on how to use the Scheduler.



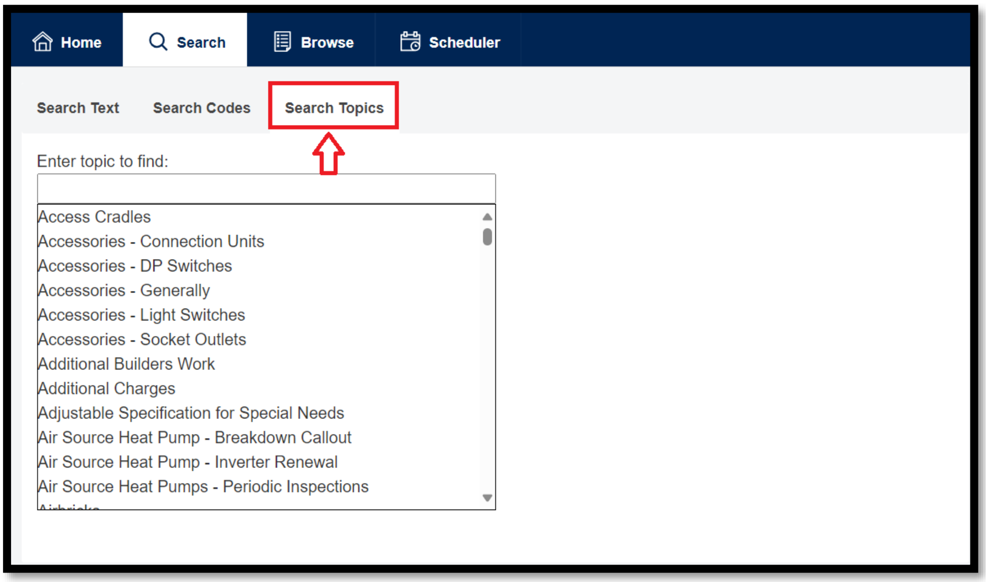
Diagnosing repairs using the topic search

You can use M3Central to search for Schedule of Rates item by topic. The same items are often listed under more than one topic to make it easier to find them. Some topics will include multiple items from different trades.

1. **Select the Search tab.**



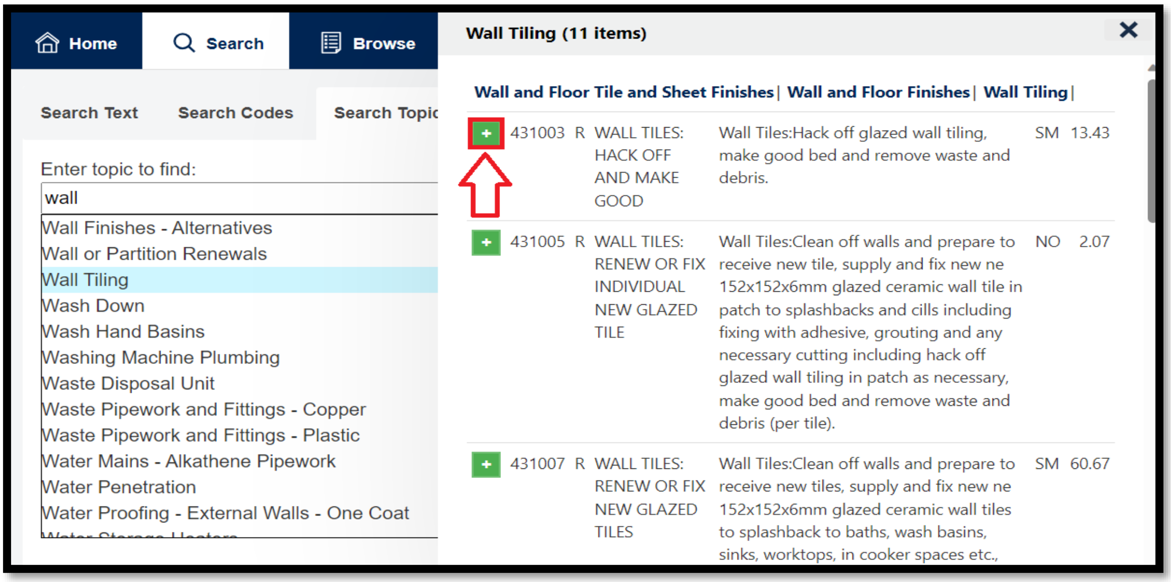
2. **Select the Search Topics heading.**



3. **Start typing in the topic you are looking for.** The window will automatically scroll to the topic as you type. Double click on a topic to view the Schedule of Rates items it includes.

   If you do not see the correct item, use the 'breadcrumbs' at the top of the window to go up one or more levels.

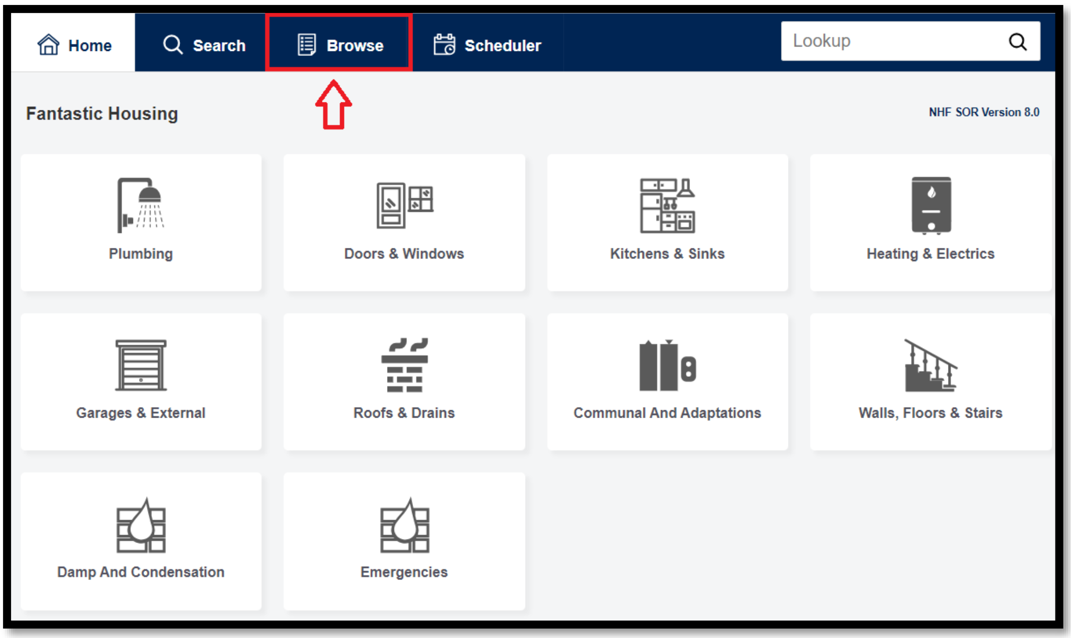
4. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Once you have finished diagnosing repairs, they can be sent to your housing management system from the Scheduler. Refer to the Using the Scheduler to send items section for more information on how to use the Scheduler.



Using the Browse tab

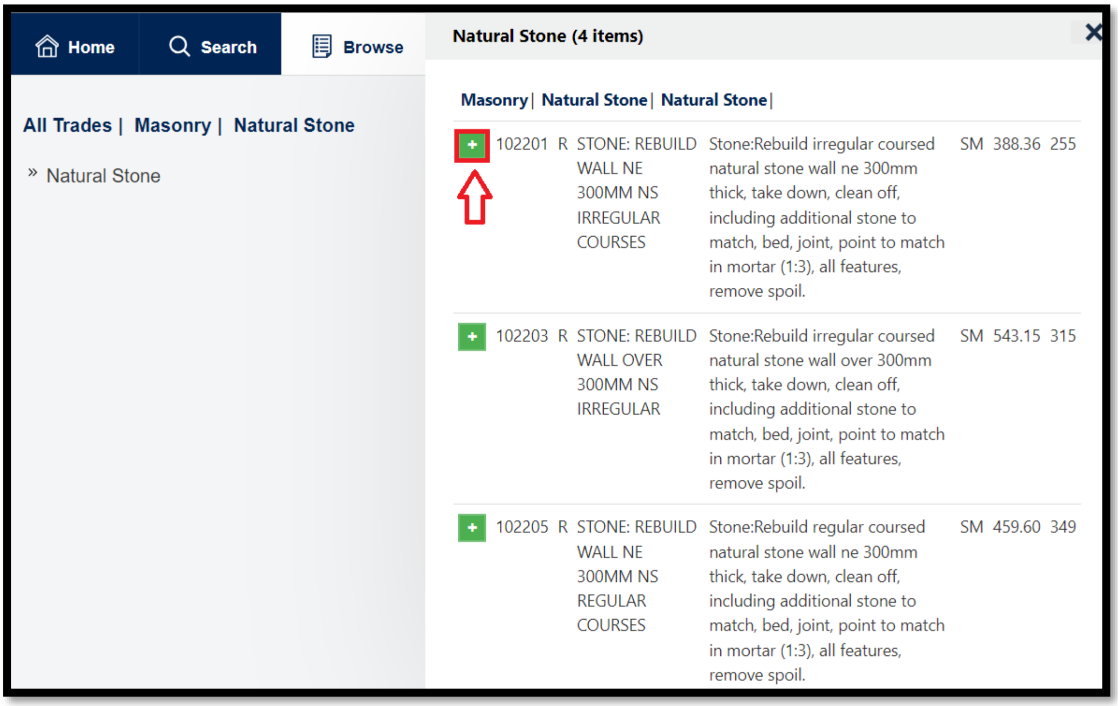
This tab has the full schedule of rates in electronic format. You can browse for items in the Schedule of Rates by searching according to trade, heading and subject. This is a more technical feature that is primarily used by staff who already know which trade the Schedule of Rates item falls under.

1. **Select the Browse tab.**



2. **Select the trade, heading and subject of the Schedule of Rates item(s) you want to view.** You can use the 'breadcrumbs' at the top of the window to go up one or more levels and look for additional related items.

3. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Once you have finished diagnosing repairs, they can be sent to your housing management system from the Scheduler. Refer to the Using the Scheduler to send items section for more information on how to use the Scheduler.



Using the Scheduler to send items

The Scheduler provides a flexible way of working with lists of Schedule of Rates items. Items in the Scheduler can be sent to your housing management system. It can also be used to collect items for any purpose and to create standard lists that can be recalled and amended for particular projects. The sections above explain how to send items to the Scheduler.

Deleting an item

You can delete items in the Schedule by selecting the **X** button.

Adding a note to an item

You can add notes to an item by selecting the **Notes** button. A window will open where you can add text or edit existing text. Select **OK** to save the note, or **Cancel** to undo changes.

Changing the quantity

You can change the quantity of any item by editing the values under the **No** column. The quantity for each item defaults to 1. The rates will automatically adjust when you enter a new quantity. Note, the rates for service contract items are shown as 0 as they are not part of the M3NHF Schedule of Rates.

Opening and saving a list

You can save a list of items for future use by selecting the **Save** or **Save As** buttons. You will NOT be warned if there are unsaved items in the Scheduler. Use the **Save As** button if you want to save an amended version of your list and keep the original. The lists are saved on the M3Central server.

You can open lists that you or other users have previously created in the Scheduler by selecting the **Open** button.

When saving or opening files you may be prompted for your User ID. Refer to the Adding or removing users (Diagnostics mode) section for more information on how to add or remove users.

Sorting the list by trade

You can sort the list by trade by selecting the **Sort** button. The sort can be undone by selecting the **Unsort** button.

Clearing a list

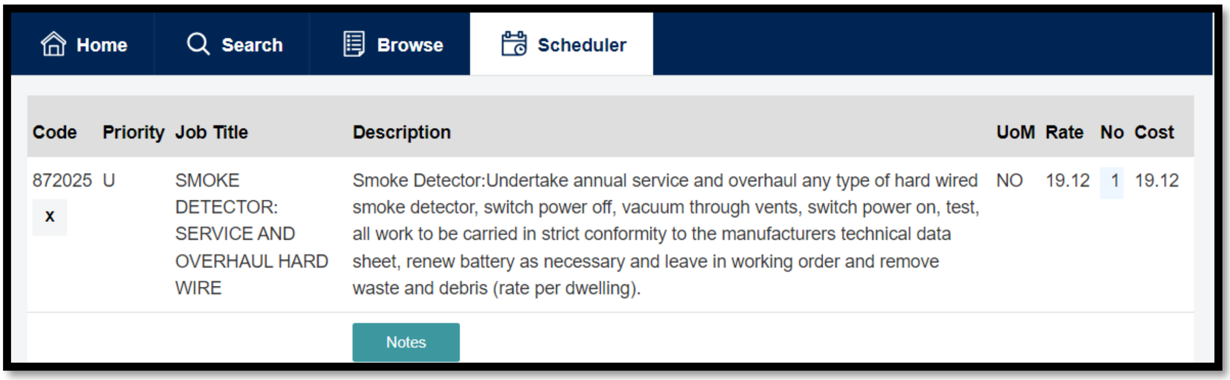
You can clear a list by selecting the **Clear** button. This will empty the Scheduler of all items. If you have not saved your list, it will be permanently deleted.

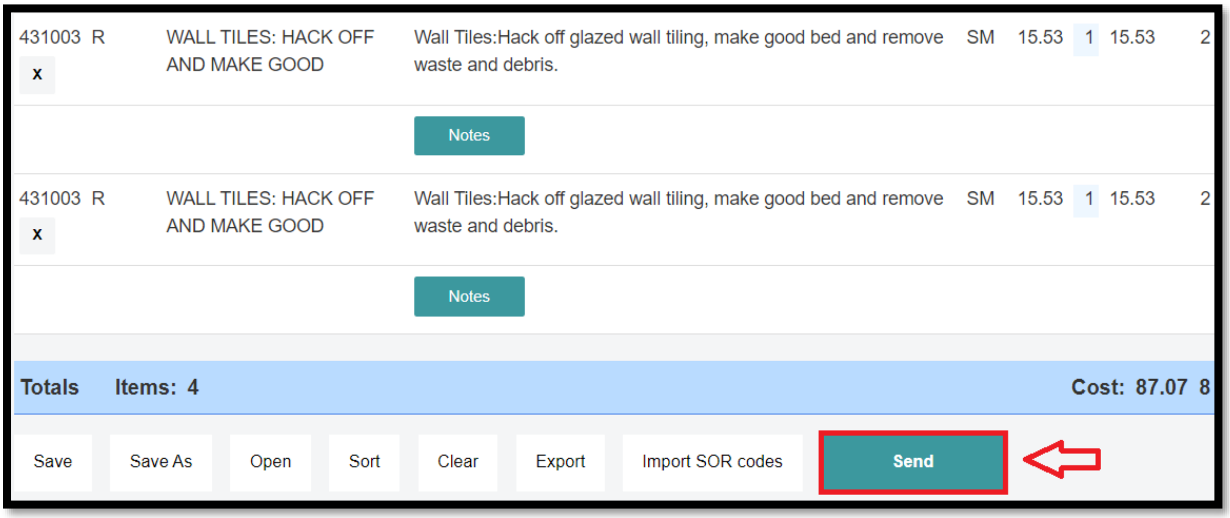
Importing SOR item codes

You can import items by selecting **Import SOR Codes**. A window will open where you can paste Schedule of Rates item codes. Once you have copied your list of codes, select the **OK** button. The Scheduler will add items to the list if it can find them in the underlying Schedule of Rates. Select the **Cancel** button once you are done adding codes to the Scheduler.

Sending items to another system

You can send items to another system by selecting the **Send** button. Refer to the *M3Central Integration Guide* for more information on integrating M3Central with other systems.

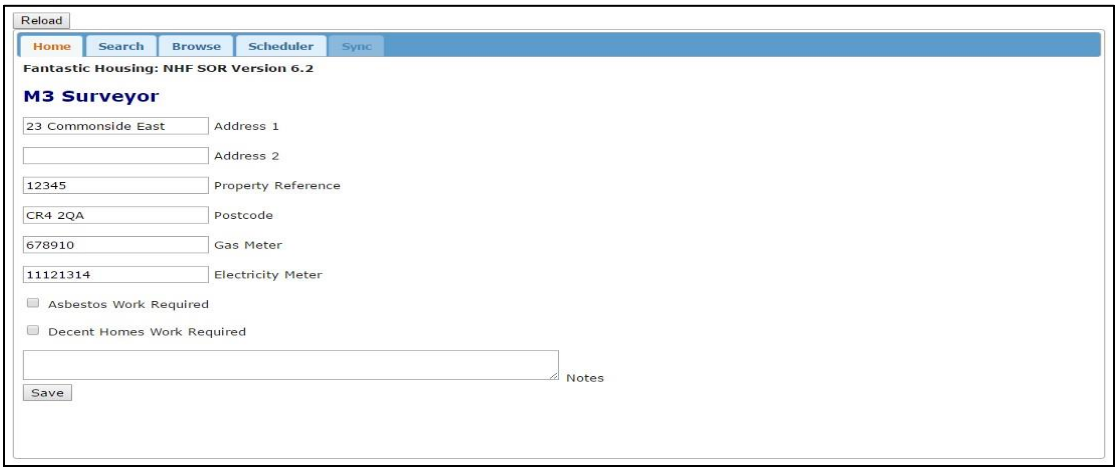




Using M3Surveyor to create a schedule of works

M3Surveyor is primarily used for void property surveys, but can also be used to create a schedule of works for any purpose. It stores surveys locally, so you can work offline and submit your data when you go online. A key feature is the ability to create templates for different property types with lists of frequently used Schedule of Rates items. Photos can be attached to each item. Once a survey has been created, you can use the Scheduler to send the repairs to your housing management system.

M3Surveyor is an add-on for M3Central Diagnostics, and can only be purchased if you already have Diagnostics mode activated.



Entering property details

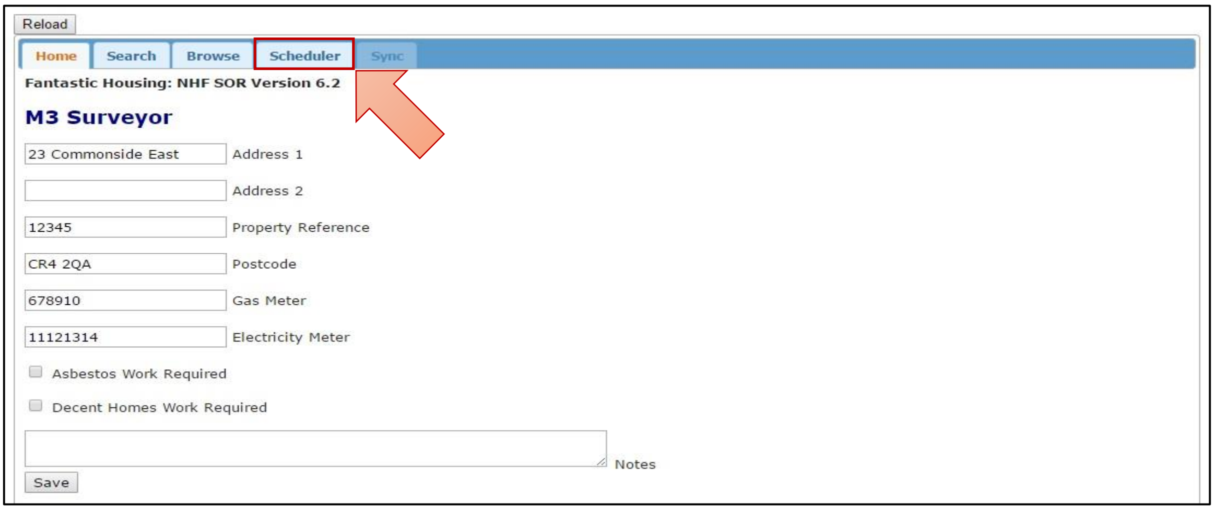
The M3Surveyor home page provides a simple form to store a property's details. You cannot add additional fields to the form, but you can modify the form and choose what information to ask for. Refer to the Editing the M3Surveyor cover form (Diagnostics mode with M3Surveyor) section for more information on how to edit the form.

Select the **Save** button to save the property survey. The details are saved locally, so even if you close and re-open your browser M3Surveyor can recall the property details.

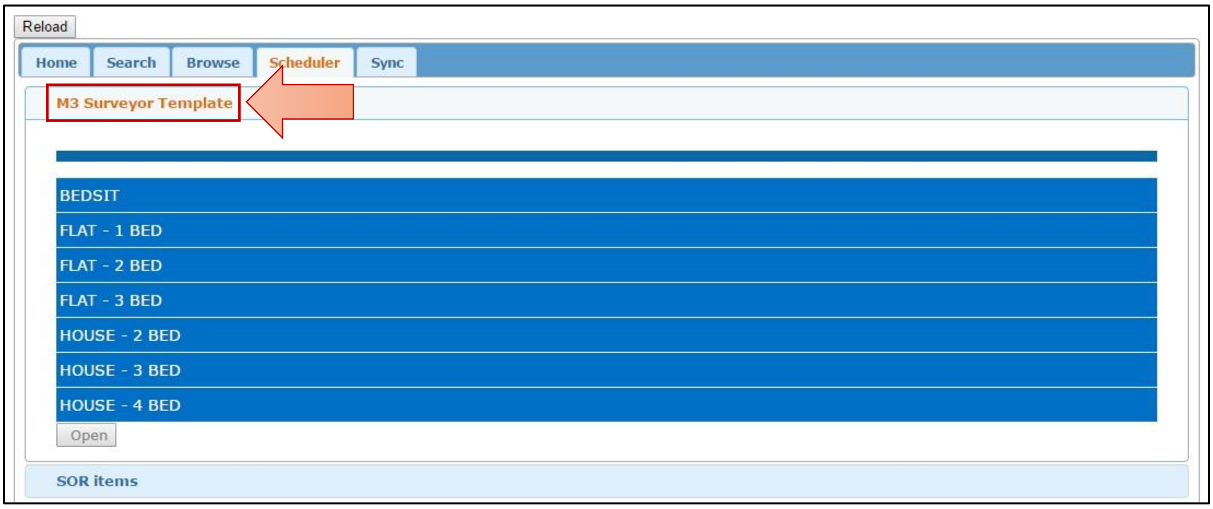
Identifying items in a template

You can create templates containing frequently used Schedule of Rates items. Templates allow you to predefine a list of items for dwellings and locations within dwellings. Refer to the Editing the M3Surveyor template (Diagnostics mode with M3Surveyor) for more information on how to create and edit templates.

1. Select the Scheduler tab.

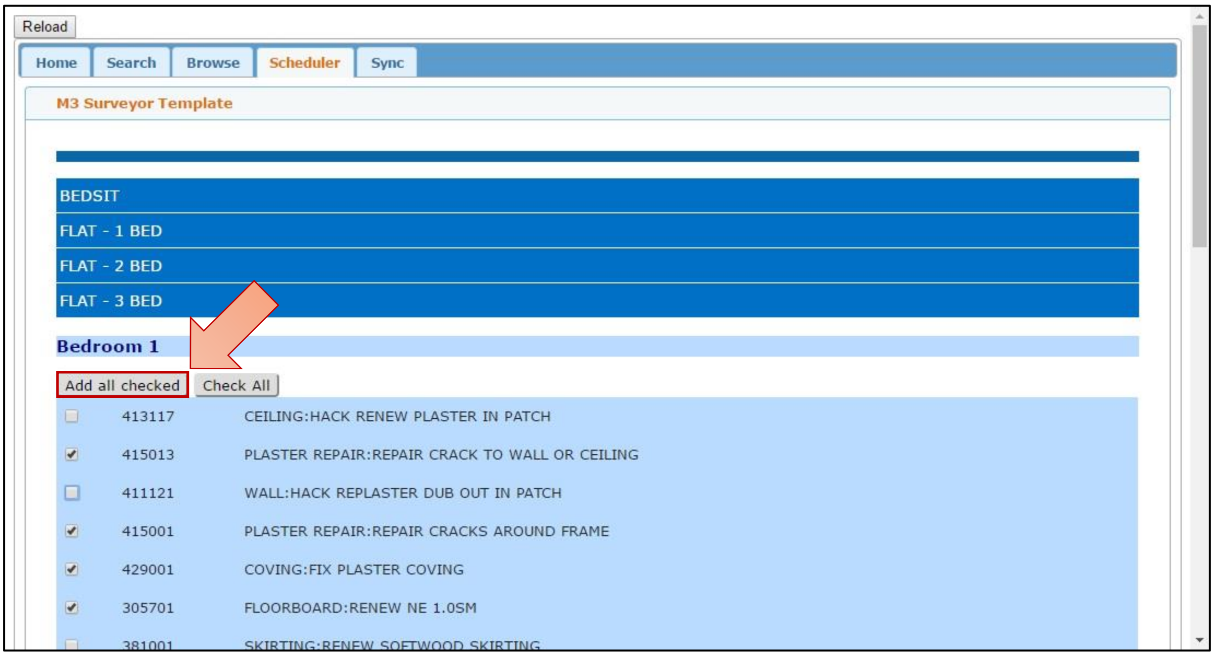


2. Select the M3Surveyor Template heading.



3. **Select the dwelling type and location of the items you want to add.** You check items individually, or you can select the **Check All** button to check all items within that location. Select the **Add all checked** button to add the items to the Scheduler.

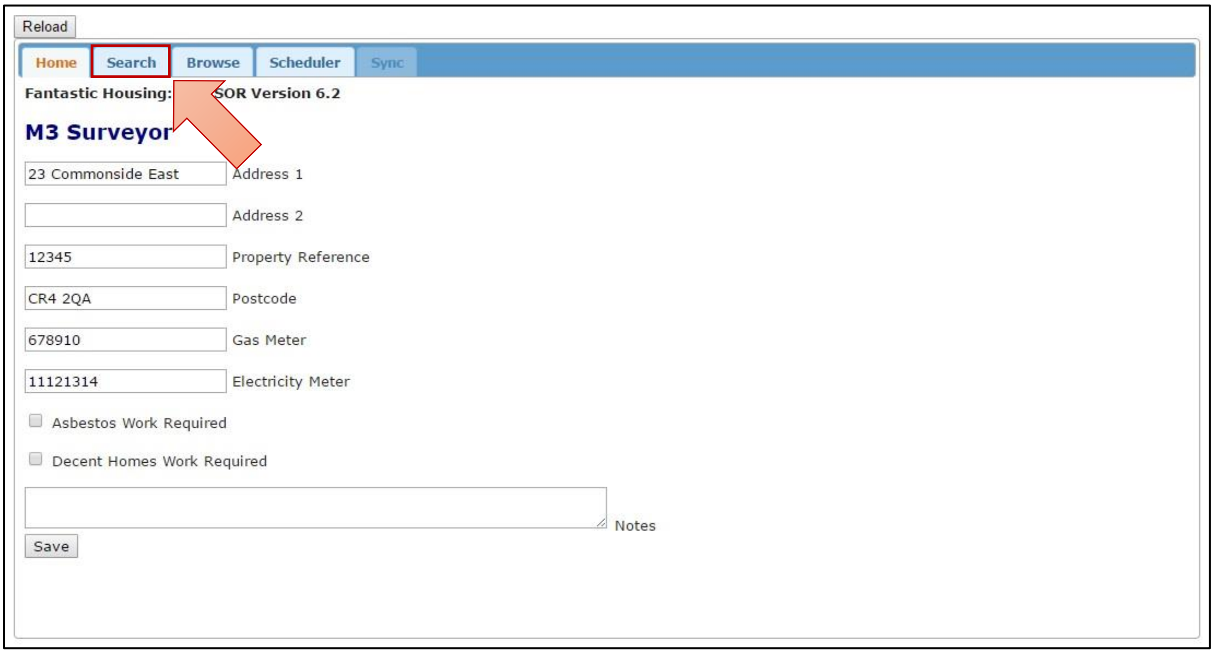
   Refer to the Using the Scheduler to send surveys section for more information on how to use the Scheduler.



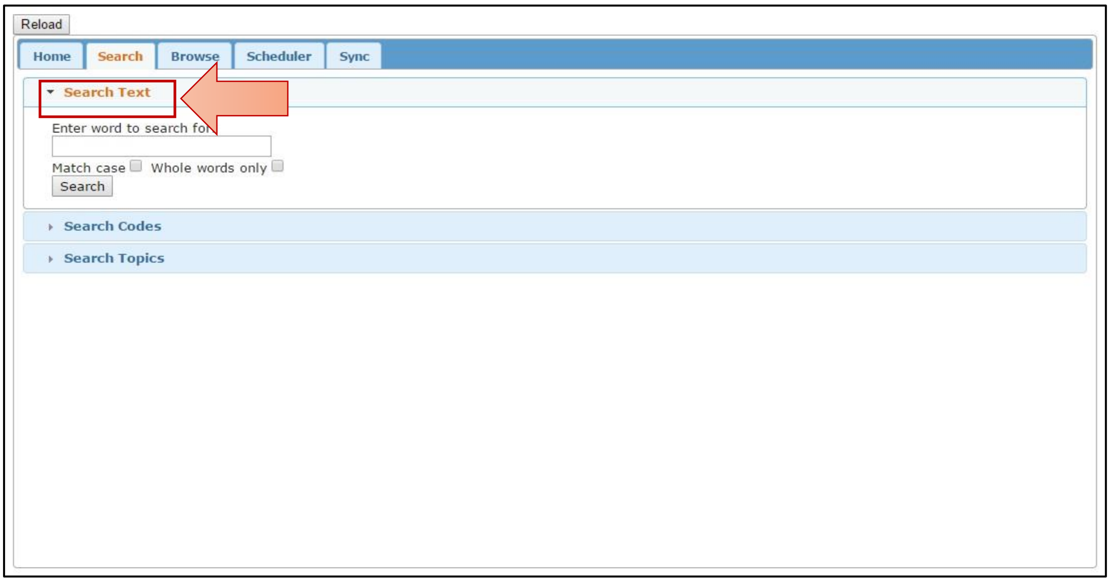
Identifying items using the text search

Items can be identified by doing a standard word search of the short and medium descriptions of the underlying Schedule of Rates. This feature can be useful, but has some limitations. The steps below will demonstrate the pros and cons of doing a text search.

1. **Select the Search tab.**

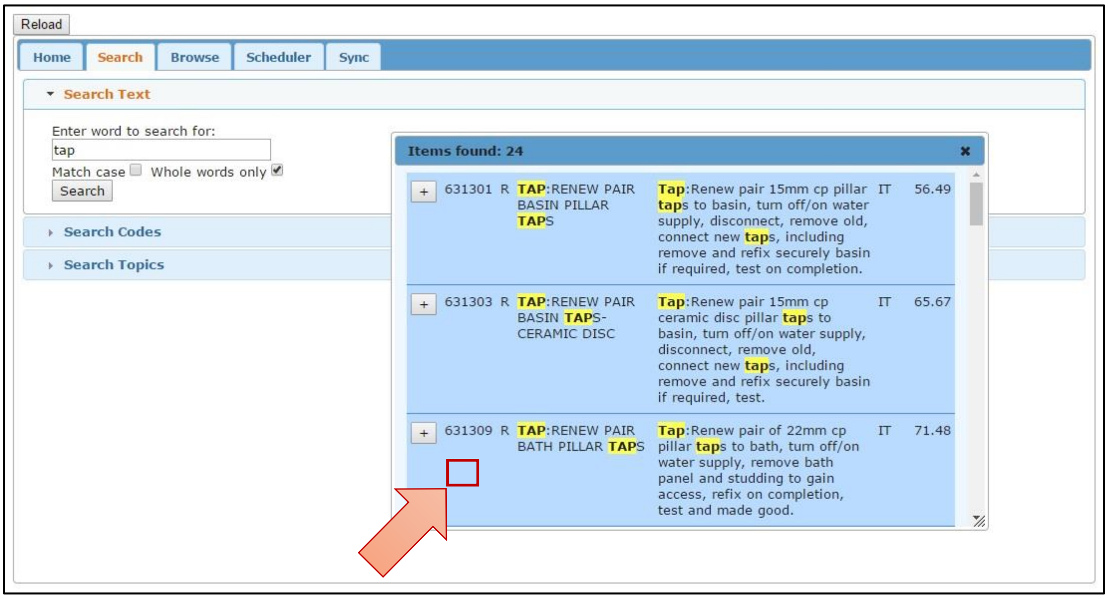


2. **Select the Search Text heading.**



3. **Enter the word to search for and select the Search button.** To improve the effectiveness of the search, you should be as specific as possible. For example, if you are using the M3NHF Schedule of Rates and search for the word 'tap', the results will display more than 70 codes, very few of which are relevant. This is because the search has picked up every instance of the word tap. The results can be improved by using the plural 'taps', or by ensuring that **Whole words only** is checked. The results will display a list of suggested Schedule of Rates items.

4. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Refer to the Using the Scheduler to send surveys section for more information on how to use the Scheduler.

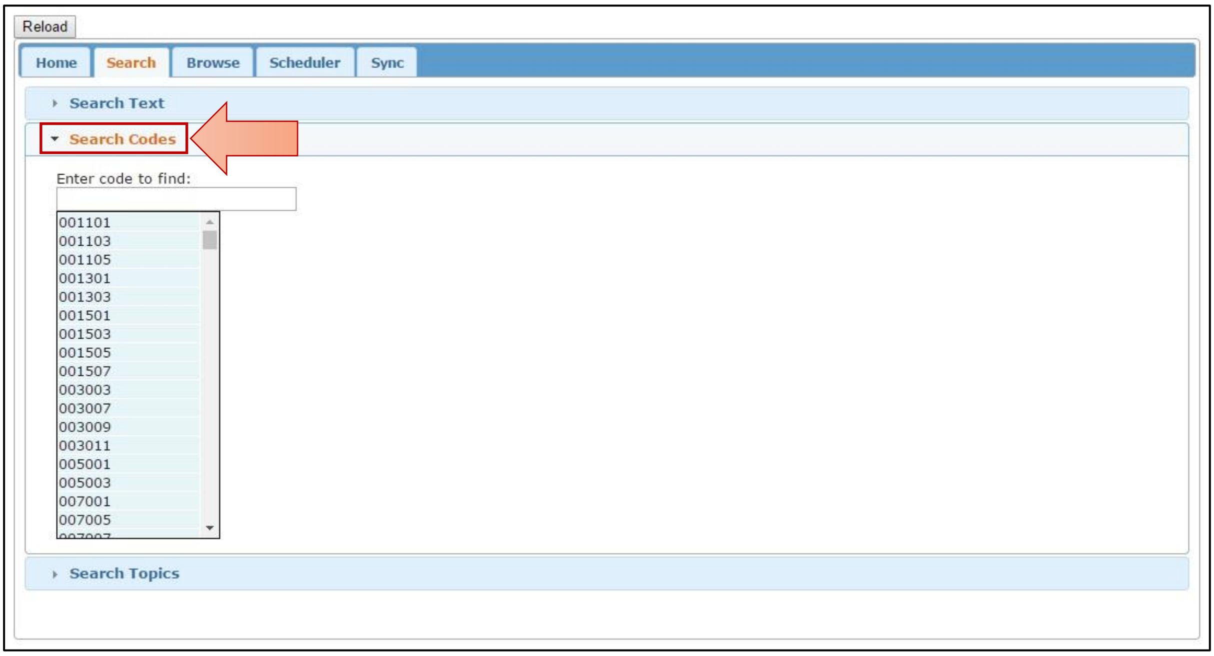


Identifying items using the code search

If you know the code of the Schedule of Rates item you are looking for, you can lookup that code directly in M3Surveyor.

1. **Select the Search tab.**

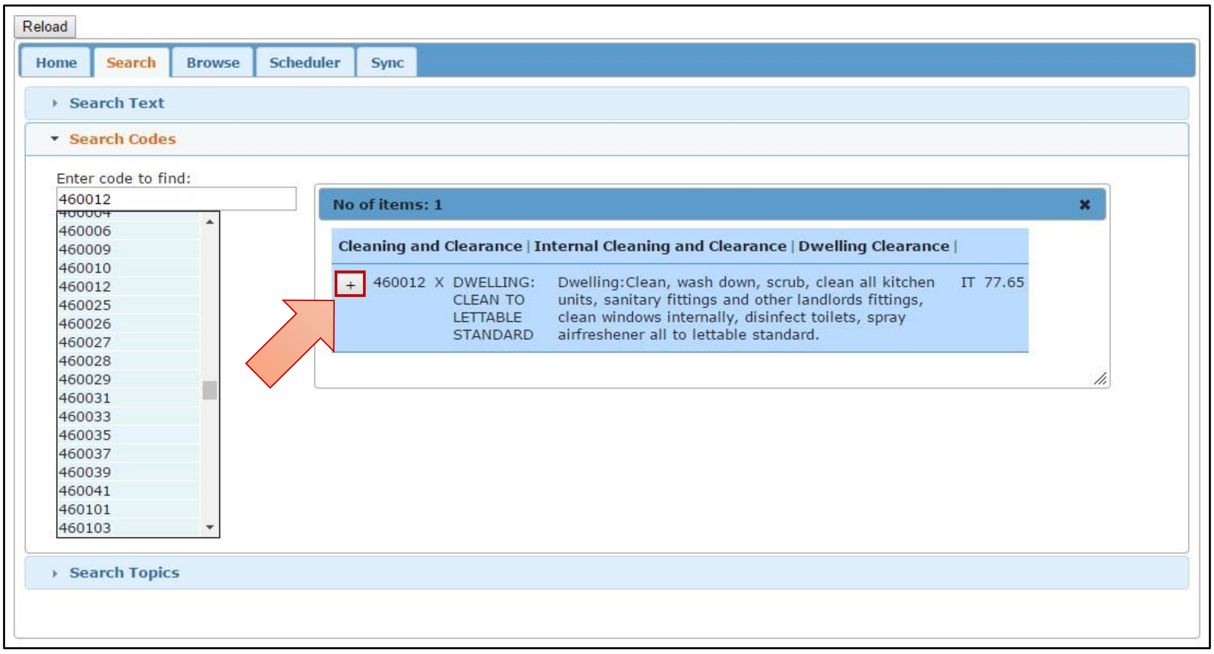
2. **Select the Search Codes heading.**



3. **Enter the code you want to find.** The window will automatically scroll to the code you entered. Double click on the code to view its details.

   You can use the 'breadcrumbs' at the top of the window to go up one or more levels and look for additional related items.

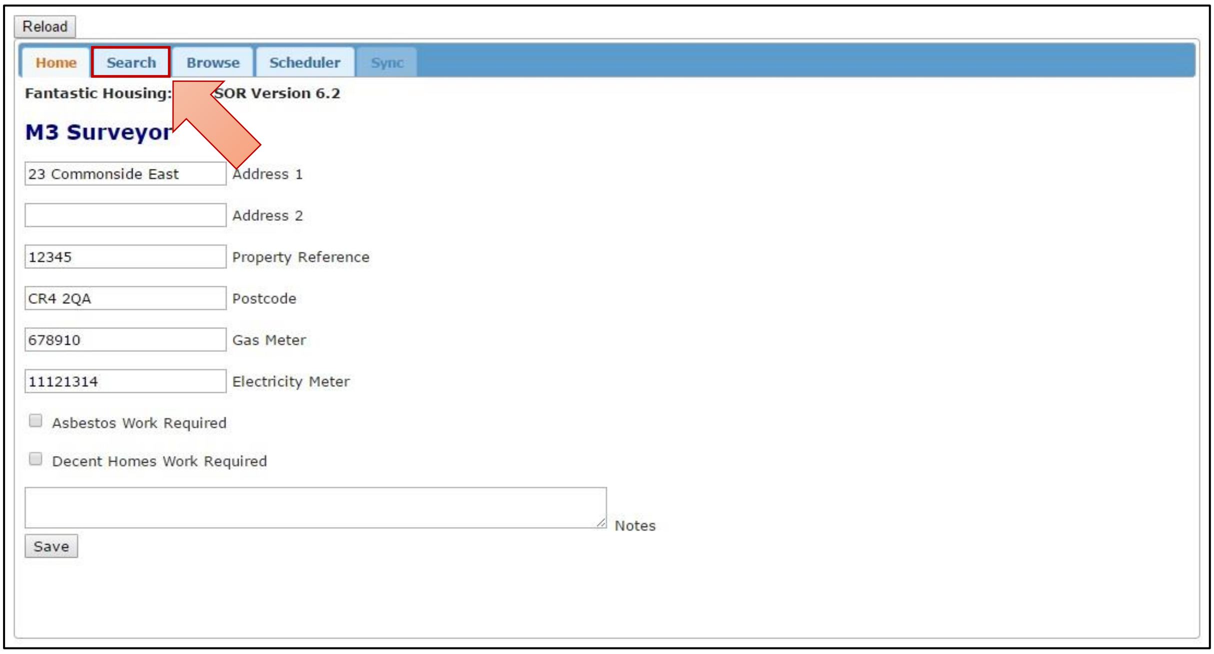
4. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Refer to the Using the Scheduler to send surveys section for more information on how to use the Scheduler.



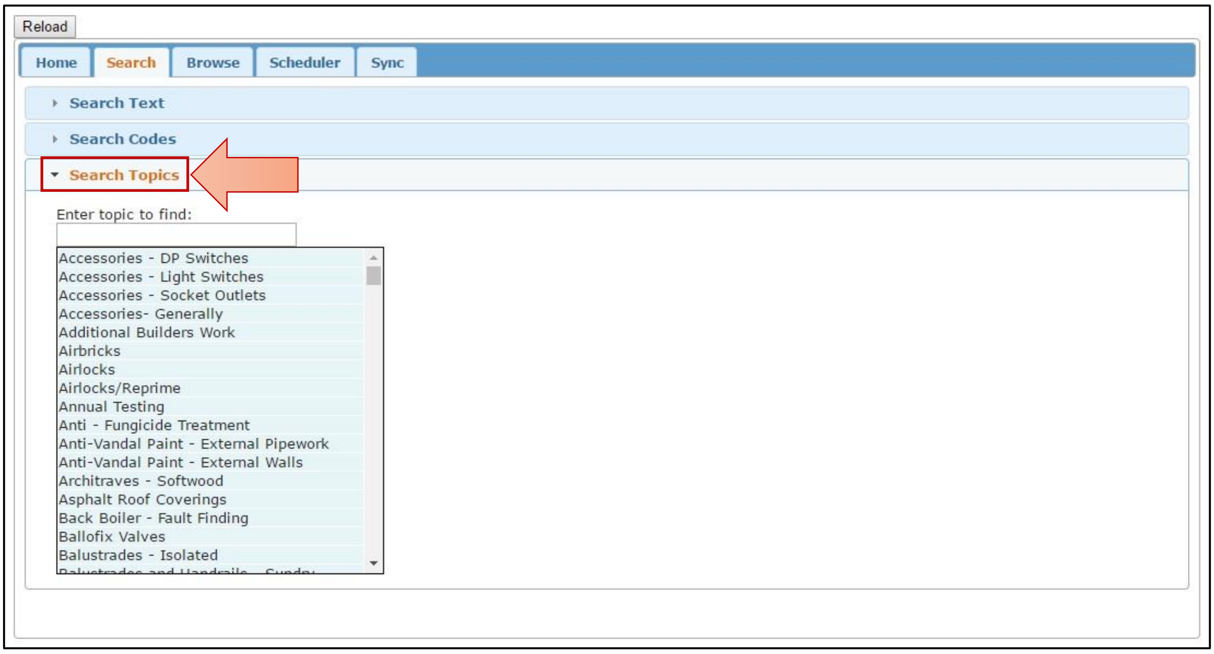
Identifying items using the topic search

You can use M3Central to search for Schedule of Rates item by topic. The same items are often listed under more than one topic to make it easier to find them. Some topics will include multiple items from different trades.

1. Select the Search tab.



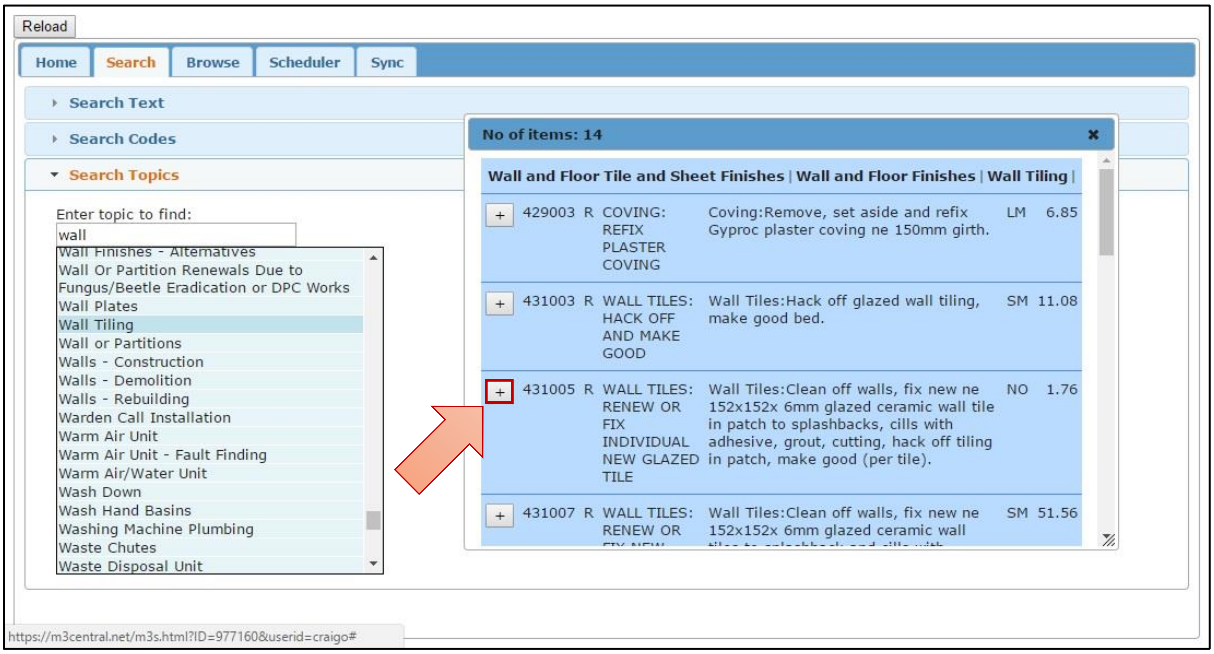
2. **Select the Search Topics heading.**



3. **Start typing in the topic you are looking for.** The window will automatically scroll to the topic as you type. Double click on a topic to view the Schedule of Rates items it includes.

   If you do not see the correct item, use the 'breadcrumbs' at the top of the window to go up one or more levels.

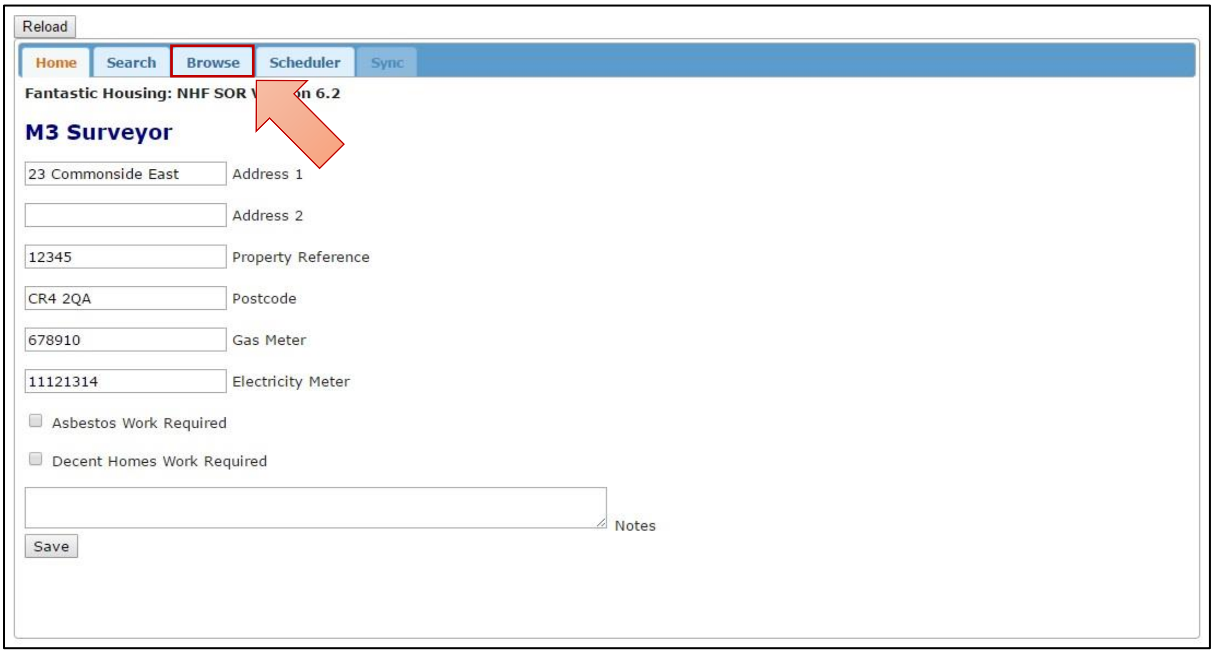
4. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Refer to the Using the Scheduler to send surveys section for more information on how to use the Scheduler.



Identifying items using the SOR Browser

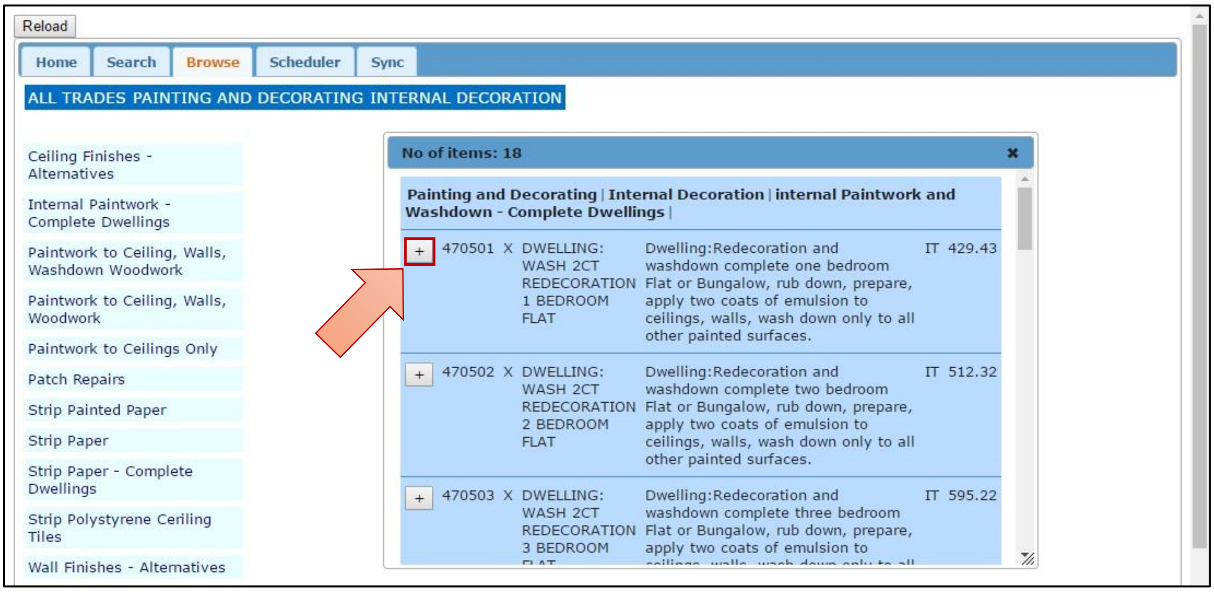
You can browse for items in the Schedule of Rates by searching according to trade, heading and subject. This is a more technical feature that is primarily used by staff who already know which trade the Schedule of Rates item falls under.

1. **Select the Browse tab.**



2. **Select the trade, heading and subject of the Schedule of Rates item(s) you want to view.** You can use the 'breadcrumbs' at the top of the window to go up one or more levels and look for additional related items.

3. **Once you have identified the correct Schedule of Rates item, send it to the Scheduler by selecting the + button next to the item.** More than one item can be added to the Scheduler. Refer to the Using the Scheduler to send surveys section for more information on how to use the Scheduler.



Using the Scheduler to send surveys

The Scheduler provides a flexible way of working with lists of Schedule of Rates items. Items in the Scheduler can be sent to your housing management system. The sections above explain how to send items to the Scheduler.

Deleting an item

You can delete items in the Schedule by selecting the **X** button.

Adding a note to an item

You can add notes to an item by selecting the **Notes** button. A window will open where you can add text or edit existing text. Select **OK** to save the note, or **Cancel** to undo changes.

Changing the quantity

You can change the quantity of any item by editing the values under the **No** column. The quantity for each item defaults to 1. The rates will automatically adjust when you enter a new quantity. Note, the rates for service contract items are shown as 0 as they are not part of the M3NHF Schedule of Rates.

Opening a saved survey

You can open a saved survey by selecting the **Open** button.

Refer to the Entering property details section for more information on saving a survey.

Sorting the list by trade

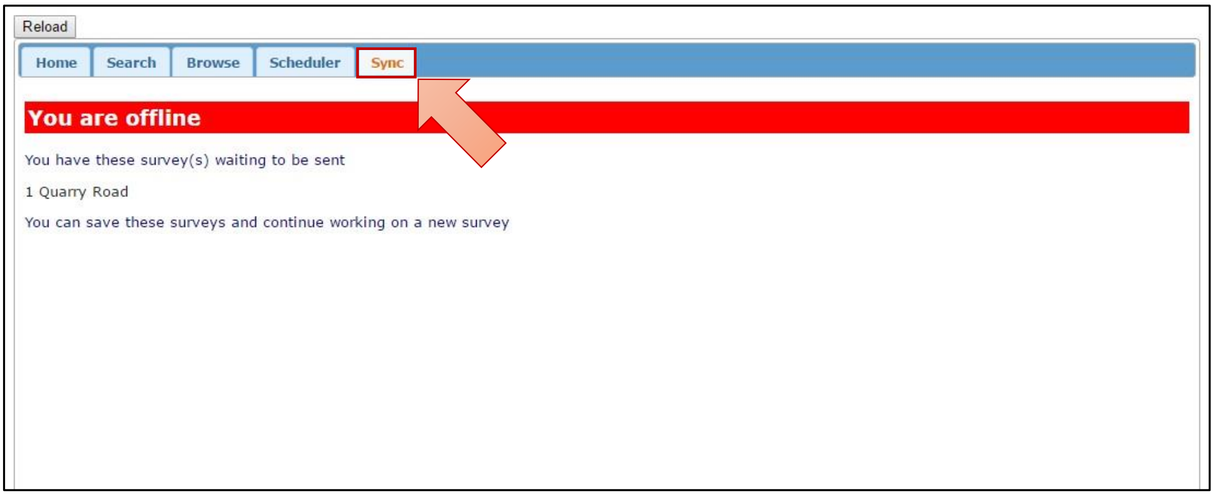
You can sort the list by trade by selecting the **Sort** button. The sort can be undone by selecting the **Unsort** button.

Clearing a list

You can clear a list by selecting the **Clear** button. This will empty the Scheduler of all items. If you have not saved your list, it will be permanently deleted.

Sending items to another system

You can send items to another system by selecting the **Sync** button. If you are offline the survey will be out into a queue. If you select the **Sync** tab you will be able to see all your surveys in the queue.



Once you are back online, you can send your surveys by selecting the **Reload** button or by selecting the **Sync** tab and selecting the survey you want to send.

Refer to the *M3Central Integration Guide* for more information on integrating M3Central with other systems.

Support

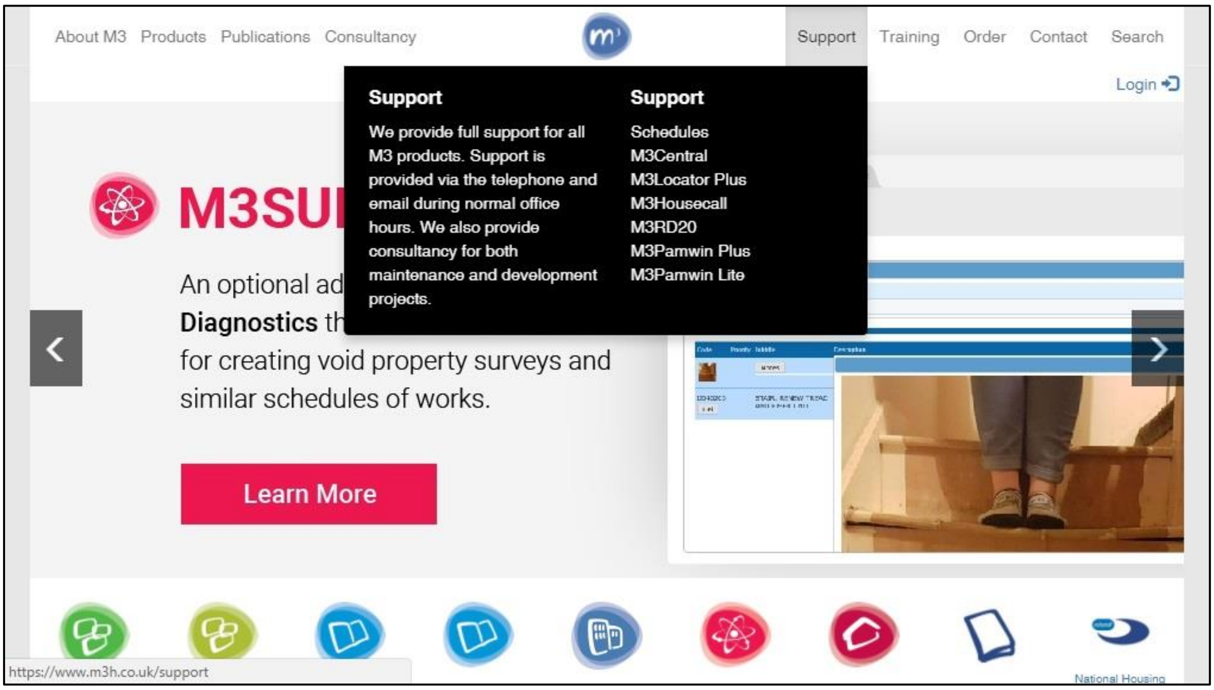
M3 provides full support to M3Central administrators, and staff who use M3Central Diagnostics and M3Surveyor.

Helpdesk

You can contact the M3 helpdesk by emailing helpdesk@m3h.co.uk or by calling the helpline on +44 (0)208 274 4010.

M3 website

You can access M3Central support via the M3 website (www.m3h.co.uk/support/m3central). This page provides answers to a list of frequently asked questions and a link to a contact form where you can raise additional support queries.



M3NHF Schedule of Rates support

For support and advice on the M3NHF Schedule of Rates visit the Schedules support page on the M3 website (www.m3h.co.uk/support/schedules). This page contains a link to a contact form where you can raise technical queries.

Thank you for using M3Central!