Contents

Training and Support .................................................................................................................................... 2
Login .............................................................................................................................................................. 3
Change Password .......................................................................................................................................... 4
Work Order Overview ................................................................................................................................... 5
Create a Routine Work Order (PM11) .......................................................................................................... 7
Create a Capital Improvement Work Order Estimate (PM 21) ................................................................. 10
Approve or Reject a Work Order ................................................................................................................ 13
Check the Status of a Work Order .............................................................................................................. 14
Search for a Work Order ............................................................................................................................. 17
Generating Standard Reports ..................................................................................................................... 18
Generating Custom Reports ........................................................................................................................ 19
Facilitron Help Manuals .............................................................................................................................. 21
Edit Profile ................................................................................................................................................... 21
TRAINING AND SUPPORT

You may contact the following for assistance:

**Security Access & Procedural Issues**
Maintenance & Operations
(909) 388-6100
Site and Department administrators determine who can create work orders. Call M&O at (909) 388-6100 for security access and logins for staff. (Unlike SAP, licenses are not limited.)

**User Support**
https://support.facilitron.com/support/tickets/new
-or-
support@facilitron.com

**Training**
Training Specialists
(909) 386-2550
techtraining@sbcusd.k12.ca.us

*PHONE USE: There is not a phone app. Go to a browser on your phone and login and enter work orders as you would on a computer.*
1. Go to the following web address:
   maintenance.facilitron.com

2. Username: first.lastname@sbcusd.k12.ca.us
   kathleen.tammaro@sbcusd.k12.ca.us

3. Password: 1234 (default)

4. You will be prompted to enter a new password once you login with the default password.

   This will be your new Facilitron password.
CHANGE PASSWORD

1. Go to the following address:
   maintenance.faciltron.com

2. Enter your district email address and click the Submit button.

3. Click on the Forgot Password link.

4. Click on the Send button.

5. Login to your district email and click on the Faciltron password reset link and create a new password. (The email link expires after 10 minutes.)
A work order is a request to have work done at your site by the M&O Department.

**IMPORTANT:** If there is a facility crisis, first call Maintenance & Operations at (909) 388-6100. Then, create a work order in Facilitron.

**Examples of Crisis Items**

<table>
<thead>
<tr>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gaseous or Chemical Odors</td>
</tr>
<tr>
<td>Signs of Smoke or Fire</td>
</tr>
<tr>
<td>Sink Holes</td>
</tr>
<tr>
<td>Flooding Inside/Outside</td>
</tr>
<tr>
<td>Power Outages</td>
</tr>
<tr>
<td>Activated Fire Alarm</td>
</tr>
<tr>
<td>Roof Leaks Not Associated with Rain</td>
</tr>
<tr>
<td>Broken Windows</td>
</tr>
<tr>
<td>Windows/Doors that Cannot be Secured</td>
</tr>
<tr>
<td>No Hot Water in Kitchen/Child Care</td>
</tr>
</tbody>
</table>

**Types of Work Orders:**

- **ROUTINE WORK ORDER (PM11)**
  
  This is a work order that will fix something that is broken. It is the type of work order that you will create the most often. An example of a Routine Work Order is fixing an air conditioner or a broken window.

- **CAPITAL IMPROVEMENT WORK ORDER ESTIMATE (PM21)**
  
  This is an estimate that is submitted to M&O for a non-maintenance upgrade that is funded by the site. A PM21 is turned into a PM41 by M&O once the estimate has been approved by Fiscal Services and the site/department administrator. (A capital improvement means that M&O will build something new at the site that is not currently there. An example of a Capital Improvement Work Order is building a wall to separate Classroom A from Classroom B.)

- **CAPITAL IMPROVEMENT WORK ORDER (PM41)**
  
  A PM21 is turned into a PM41 by M&O once the estimate has been approved by Fiscal Services and the site/department administrator. This is a non-maintenance upgrade that is funded by the site.
Routine Work Order Process:

- Site staff submit a work order (PM11) via Facilitron.
- The work order is routed to M&O for processing. (Work orders can be edited up until the time they are processed. Afterward you must contact M&O to edit a work order.)
- Staff can check on the status of a work order within the Facilitron system.

Capital Improvement Work Order Process:

- Site staff submit a work order estimate (PM21) via Facilitron.
- A designated Site Approver (usually the principal or administrator) approves the work order estimate.
- M&O will process the work order and generate an estimate which is forwarded to the principal or administrator of the site via email.
- If the principal or administrator approves the estimate and decides to proceed with the work, their Buyer at Fiscal Services will assign the appropriate budget for the work.
- The work order will then be emailed back to the principal or administrator as approved and M&O will turn the estimate into a PM41 and schedule the work.
- Staff can check on the status of a work order within the Facilitron system.
CREATE A ROUTINE WORK ORDER (PM11)

1. Click on the **New** icon.

The **New Work Order** screen will display. You have the option to click the **Change Requestor** button to switch the work order requestor, e.g. from the secretary to the principal.

2. Select the **Property**.

3. Disregard the **Budget** field.

4. Select the **Location** of the issue. (Campus Wide and Campus Exterior are options.)
If you do not see the location listed, click on the green plus sign to input more detailed information about the location. When finished, click the **Create** button.

5. In the **Description** field, enter a description of the issue.

6. In the **Purpose** field, select **PM11 – Routine Repair & Maintenance**.

7. Click the **Create** button.

8. Your work order has been created and you will receive a confirmation email.

![The work order has been submitted, thank you.](image)

**Work Order Number:** FY18-19-00378
Additional Options

- Click on the **Print WO** button to print the work order.

- Click on the **Browse** button to **Upload a File** related to the Work Order. (This could be a photo of the issue.)

```
Files for this Work Order

Upload a File: Browse... P&P Master.doc

Description:
You may optionally specify a name or short description for the file you are uploading.

Upload File
```
CREATE A CAPITAL IMPROVEMENT WORK ORDER ESTIMATE (PM 21)

This is a non-maintenance upgrade that is funded by the site. For example, a capital improvement could be building a new fence. After you submit the work order, M&O will generate an estimate. This is forwarded to the principal or administrator of the site via email. If the principal or administrator approves the estimate and decides to proceed with the work, their Buyer at Fiscal Services will assign the appropriate budget for the work. The work order will then be emailed back to the principal or administrator as approved and M&O will schedule the work.

1. Click on the New icon.

The New Work Order screen will display. You have the option to click the Change Requestor button and switch the work order requestor, e.g. from the secretary to the principal.

2. Select the Property.

3. In the Budget field, enter the appropriate budget.

4. Select the Location of the issue.
If you do not see the location listed, click on the green plus sign to input more detailed information about the location. When finished, click the Create button.

5. In the Description field, enter a description of the issue.

   Description: Capital Improvement Work Order: We would like to build a wall to separate Classroom A from Classroom B.

6. Click the Create button.

7. Your work order has been created.

   The work order has been submitted, thank you.

   Work Order Number: FY18-19-00378
Additional Options

- Click on the **Print WO** button to print the work order.

  ![Print WO Button](image)

- Click on the **Browse** button to **Upload a File** related to the Work Order. (This could be a photo of the issue.)

  ![Files for this Work Order](image)
Staff will receive emails throughout the work order process. When it is time for an administrator to approve a PM21 estimate, the administrator will receive an email. They will click on the link inside the email and login to the Facilitron system. They will follow the steps below to approve the estimate, so that it can be turned into a PM41.

1. **Mouseover Work Orders and choose Approve Work Orders.**

2. **Click the Approve or Reject buttons.**

   ![Approve or Reject Work Orders]

   You also have the option to click the **Approve All on Page** or **Reject All on Page** buttons.
CHECK THE STATUS OF A WORK ORDER

Enter the work order number (after the zeros) into the Search box at the top of the Facilitron window and hit the Enter key.

-or-

Mouseover Work Orders and choose Active.

A list of your open Work Orders will appear. You will be able to see the Created Date, Originator Name (who created it), who it has been Assigned to, the Status, the Room/Location, the Description, and the Work Order #.

<table>
<thead>
<tr>
<th>Created Date</th>
<th>Originator Name</th>
<th>Assigned To</th>
<th>Status</th>
<th>Room/Location</th>
<th>Description</th>
<th>Work Order #</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/4/2019</td>
<td>Darlene Peters</td>
<td>Approved</td>
<td>Classroom, NP-1</td>
<td>There is a water leak under the sink in the Staff Break Room.</td>
<td>FY18-19-00378</td>
<td></td>
</tr>
<tr>
<td>5/24/2019</td>
<td>Darlene Peters</td>
<td>Assigned to Supervisor</td>
<td>Multi-Use Room, Multi-Use Room</td>
<td>Door doesn’t lock</td>
<td>FY18-19-00103</td>
<td></td>
</tr>
</tbody>
</table>

The Status column gives you the following information:

- Approved – M&O has received the work order, but it is not yet assigned to a staff member.
- Assigned to Supervisor - It has been given to an M&O supervisor and they will delegate to staff.
- Received - It has been assigned to a staff member.
- Pending Haz Mat Approval – There is potentially hazardous material in the work order location (e.g. asbestos in the wall). The Safety Office will evaluate the situation and give M&O approval to proceed.
You can search for a work order using the **Work Order Number**, who it is **Assigned To**, the **Originator** (who created it), and the **Status**. Click the **Apply Filter** button after entering the filter criteria.

![Filter Criteria](image)

You can print out all the open work orders by clicking on the **Batch Print Active WO’s** button.

![Batch Print Active WO's](image)

To see the work order details, you can click on the **Work Order #** link.

![Work Order #](image)

The following information will display:

- **Purpose** (type of work order)
- **Priority**
- **Requested By Date**
- **Scheduled Date & Time**
- **Assigned Worker** (staff person assigned)
- **Current Status**
- **Closed Date**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Priority</th>
<th>Requested By Date</th>
<th>Scheduled Date &amp; Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>PM11 - Routine R</td>
<td>Medium</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assign/Update Worker</th>
<th>Assigned Worker</th>
<th>Current Status</th>
<th>Closed Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>--Select--</td>
<td>-- unassigned</td>
<td><strong>Assigned to Super</strong></td>
<td></td>
</tr>
</tbody>
</table>
The **Show Detail** button displays the following information.

![Show Detail Button]

<table>
<thead>
<tr>
<th>CC/Requestor</th>
<th>Darlene Peters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td><a href="mailto:Darlene.Peters@sbcusd.k12.ca.us">Darlene.Peters@sbcusd.k12.ca.us</a></td>
</tr>
<tr>
<td>Additional Copied Users</td>
<td>There are no additional copied users for this work order.</td>
</tr>
<tr>
<td>Approval</td>
<td></td>
</tr>
<tr>
<td>Date Approved</td>
<td>5/28/2019 3:17 PM</td>
</tr>
<tr>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>Approver</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Creator</td>
<td>Darlene Peters</td>
</tr>
<tr>
<td>Last Modified By</td>
<td><a href="mailto:laurio.daniels@sbcusd.k12.ca.us">laurio.daniels@sbcusd.k12.ca.us</a>, 5/28/2019 3:17:51 PM</td>
</tr>
<tr>
<td>Maint. Liaison</td>
<td>McJimsey, Kim</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:Kim.McJimsey@sbcusd.com">Kim.McJimsey@sbcusd.com</a></td>
</tr>
</tbody>
</table>

The **Detail Reports/History** button allows you to run the following reports.

![Detail Reports/History Button]

### Available Reports

- Cost Summary
- Estimate Format
- History Report

[View Report]
Enter the work order number into the search field at the top right-hand side of the screen and click the Enter key. The work order will appear.

-or-

1. Mouseover Work Orders and choose Search.

2. Use any of the search options below in order to narrow down the search and then click the Apply Filter button. The search results will display at the bottom of the screen.

- Select a date range and click the Apply Filter button.

- Input a Work Order Number and click the Apply Filter button.

- Input the Room/Location and click the Apply Filter button.

- Input a Description or Keyword(s) and click the Apply Filter button.

- Use the drop-down menus to filter by Assigned To, Site, Trade, Purpose, or Status.
GENERATING STANDARD REPORTS

There are currently two standard reports that can be run in Facilitron. The other reports must be created in the Report Generator (instructions on following page).

Standard Reports:

- **All Open Work Orders** – This report displays any open work orders.
- **Over 30 Days** – This report displays any work orders that are over 30 days old.

1. Mouseover **Reports > Status Reports** and choose the **All Open Work Orders** or **Over 30 Days** report.

![Reports menu](image)

The report will generate.

![Work Order report](image)
GENERATING CUSTOM REPORTS

Custom reports can be created in the Report Generator. Use the report options shown below to customize your report. After choosing the options, click the Apply Filter button. The report will generate and the results will display at the bottom of the screen.


2. Select your report options.
   - Select a date range and click the Apply Filter button.
     
     | From | To  |
     |------|-----|
     | 01/01/2019 | 06/11/2019 |

   - Input a Work Order Number and click the Apply Filter button.
     
     Work Order Number: FY18-19 - 00183

   - Input the Room/Location and click the Apply Filter button.
     
     Room/Location: Multi-Use Room

   - Input a Description or Keyword(s) and click the Apply Filter button.
     
     Description Keyword(s): water leak
• Use the drop-down menus to filter by **Assigned To, Site, Trade, Purpose, or Status.**

<table>
<thead>
<tr>
<th>Assigned To:</th>
<th>-- All --</th>
<th>Purpose:</th>
<th>-- All --</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site:</td>
<td>Northpark</td>
<td>Status:</td>
<td>-- All --</td>
</tr>
<tr>
<td>Trade:</td>
<td>-- All --</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Click the **Apply Filter** button.

The report will generate and the results will display at the bottom of the screen.
FACILITRON HELP MANUALS

1. From the homepage, mouseover your name and choose Help.

2. Click on the manual you wish to download –or- type a keyword into the Search field and click the Search Help button.

EDIT PROFILE

Edit Your Profile

1. Mouseover Manage and choose My Profile.

2. Click on the Edit link.

3. Edit your profile information and click the Update button.