IT Applications Training & Support

facilitron®

Work Orders

Creating, Processing, and Approving Work Orders

SAN BERNARDINO CITY
UNIFIED SCHOOL DISTRICT

Revised – 4/2/2021

Contents

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

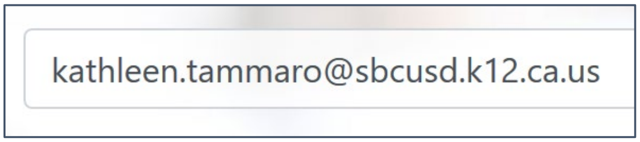
techtraining@sbcusd.k12.ca.us

***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.*

LOGIN

1. Go to the following web address: maintenance.facilitron.com

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



3. Password: 1234 (default)

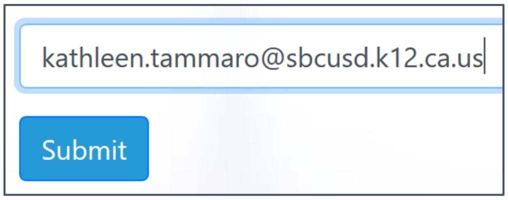
4. You will be prompted to enter a new password once you login with the default password.

   This will be your new Facilitron password.

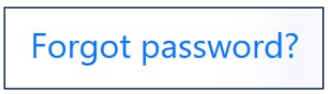
CHANGE PASSWORD

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

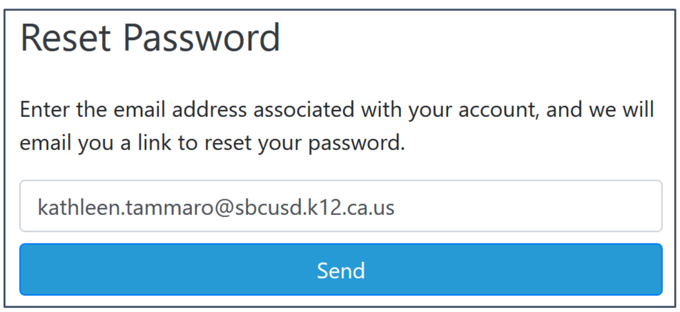
2. Enter your district email address and click the **Submit** button.



3. Click on the **Forgot Password** link.



4. Click on the **Send** button.



5. Login to your district email and click on the Facilitron password reset link and create a new password. (The email link expires after 10 minutes.)

WORK ORDER OVERVIEW

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

• Gaseous or Chemical Odors	• Activated Fire Alarm
• Signs of Smoke or Fire	• Roof Leaks Not Associated with Rain
• Sink Holes	• Broken Windows
• Flooding Inside/Outside	• Windows/Doors that Cannot be Secured
• Power Outages	• No Hot Water in Kitchen/Child Care

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:

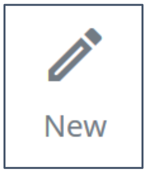
- Site staff submit a work order (PM11) via Facilitron.
- The work order is routed to M&O for processing. (Work orders can be edited up until the time they are processed. Afterward you must contact M&O to edit a work order.)
- Staff can check on the status of a work order within the Facilitron system.

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.

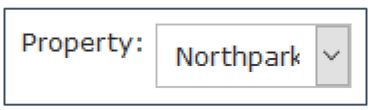
CREATE A ROUTINE WORK ORDER (PM11)

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



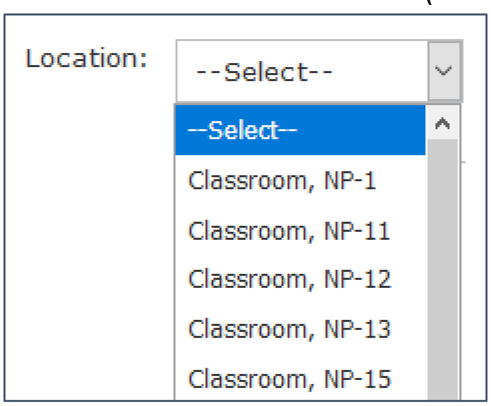
The **New Work Order** screen will display. You have the option to click the **Change Requestor** button to switch the work order requestor, e.g. from the secretary to the principal.

2. Select the **Property**.

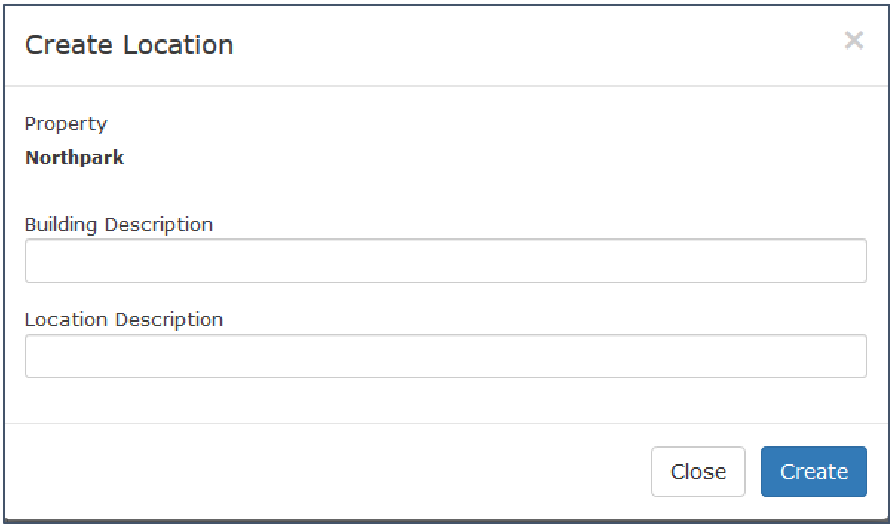


3. Disregard the **Budget** field.

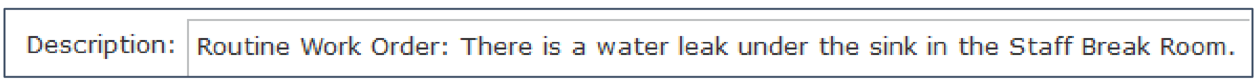
4. Select the **Location** of the issue. (Campus Wide and Campus Exterior are options.)



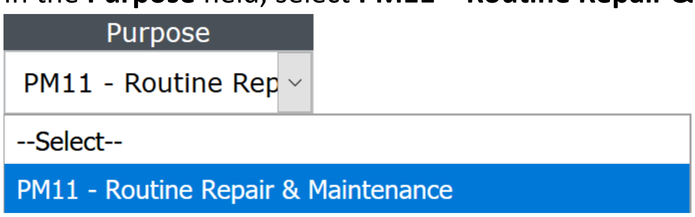
If you do not see the location listed, click on the green plus sign to input more detailed information about the location. When finished, click the **Create** button.



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

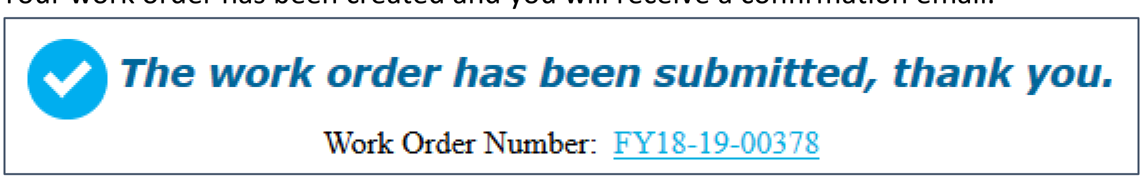


6. In the **Purpose** field, select **PM11 – Routine Repair & Maintenance**.



7. Click the **Create** button.

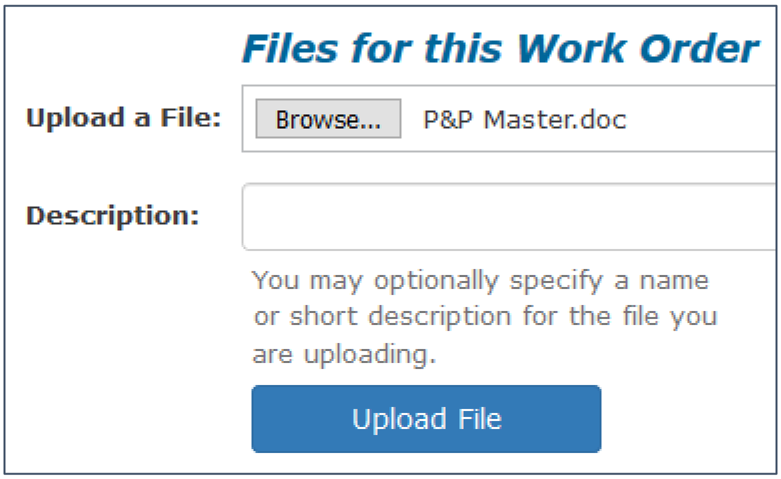
8. Your work order has been created and you will receive a confirmation email.



Additional Options

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

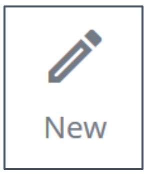
- Click on the **Browse** button to **Upload a File** related to the Work Order. (This could be a photo of the issue.)



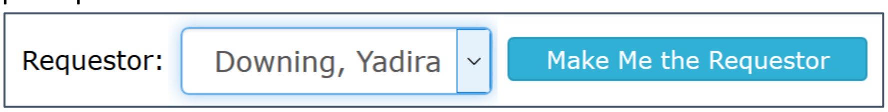
CREATE A CAPITAL IMPROVEMENT WORK ORDER ESTIMATE (PM 21)

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.

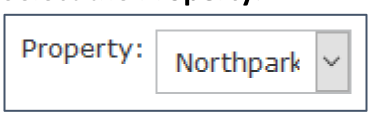
1. Click on the **New** icon.

   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.

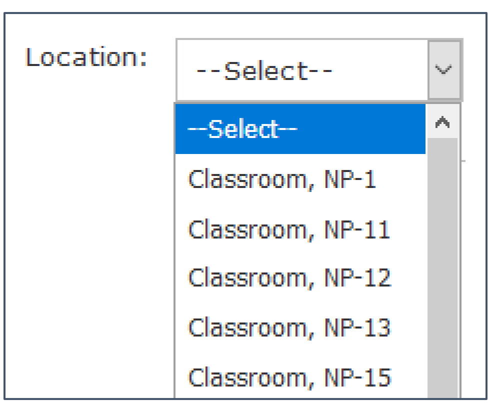
   

2. Select the **Property**.

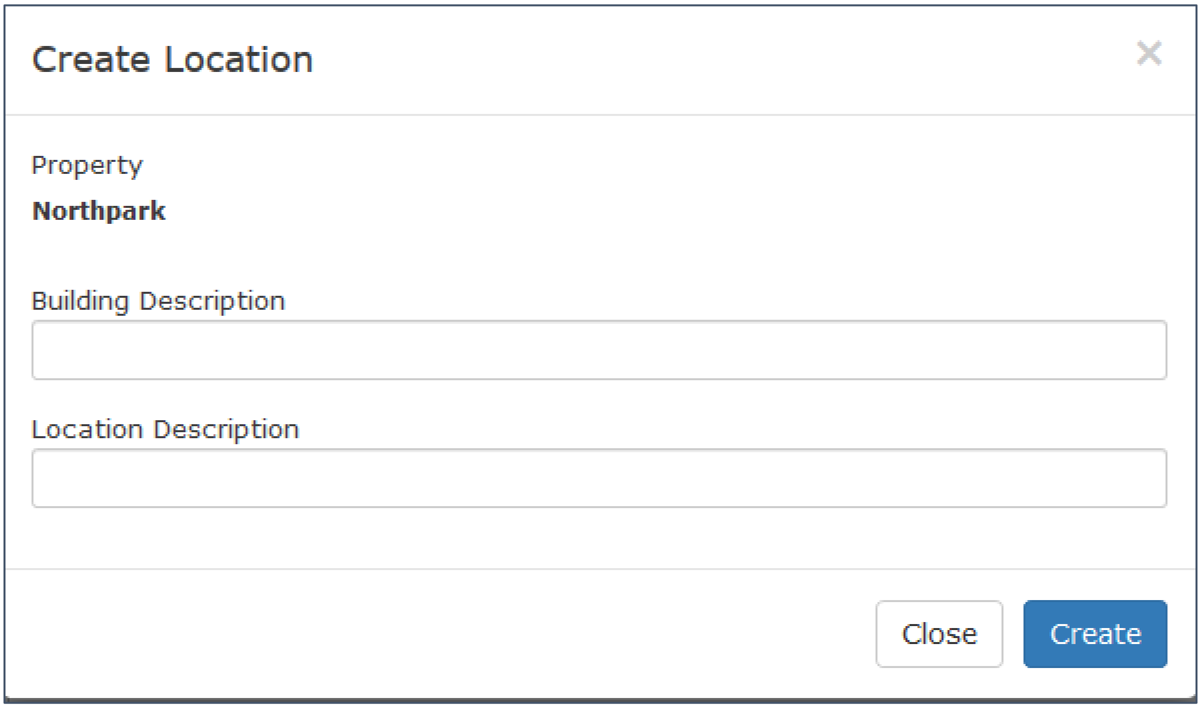
   

3. In the **Budget** field, enter the appropriate budget.

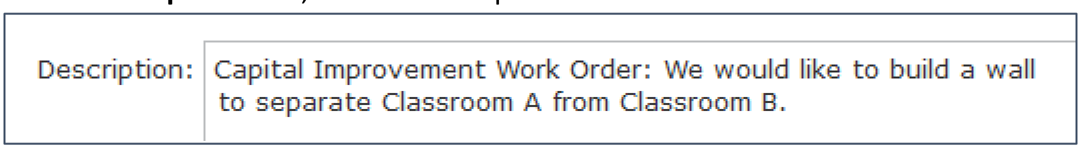
4. Select the **Location** of the issue.

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.

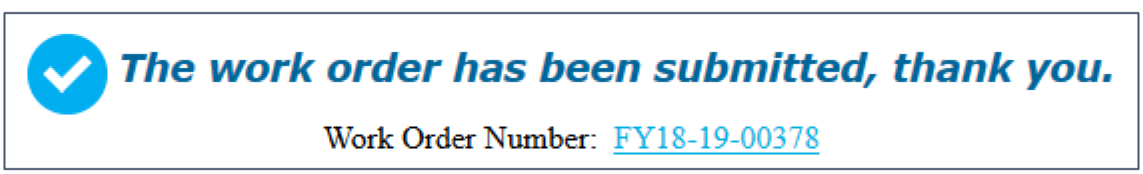


5. In the **Description** field, enter a description of the issue.



6. Click the **Create** button.

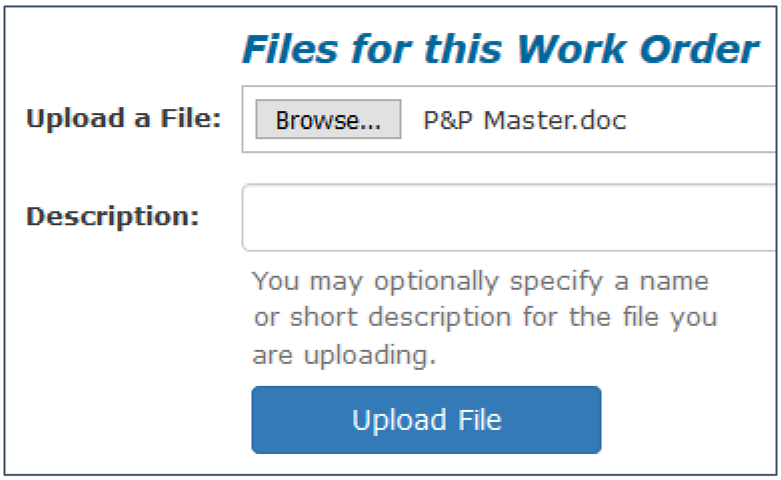
7. Your work order has been created.



Additional Options

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

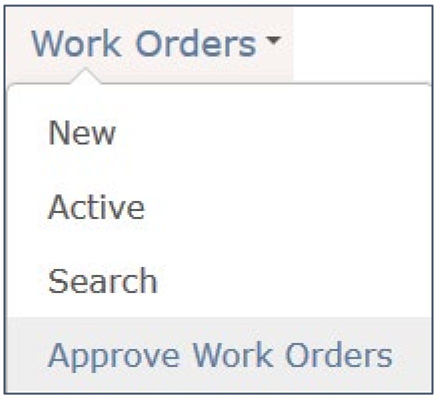
- Click on the **Browse** button to **Upload a File** related to the Work Order. (This could be a photo of the issue.)



APPROVE OR REJECT A WORK ORDER

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.

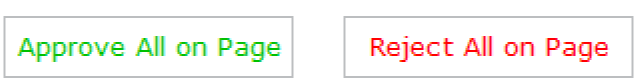
1. Mouseover **Work Orders** and choose **Approve Work Orders**.



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

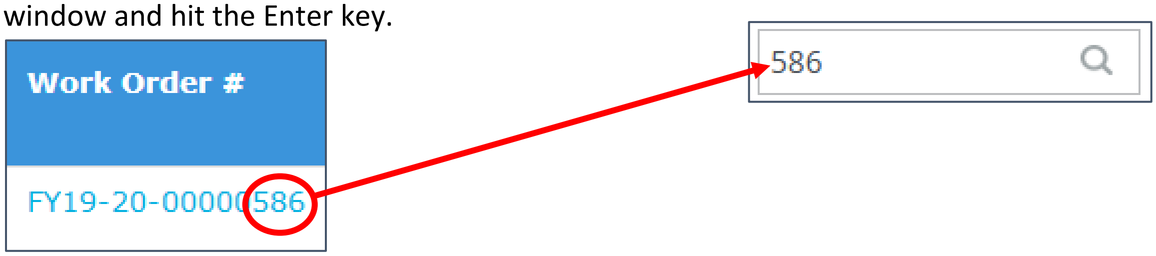
Work Order #	Date	Rm/Location & Description	Notes	Approve	Reject	Notify Originator Approved
FY16-17-03018	5/12/2017	MPR stage area Please remove mouse nest in curtains - stage left, bottom of curtain in curtain well.		Approve	Reject	☑
FY16-17-03015	5/2/2017	P-12 Floor sagging from leak in roof.		Approve	Reject	☑

You also have the option to click the **Approve All on Page** or **Reject All on Page** buttons.



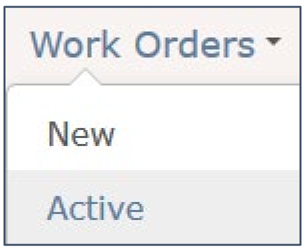
CHECK THE STATUS OF A WORK ORDER

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 #**.

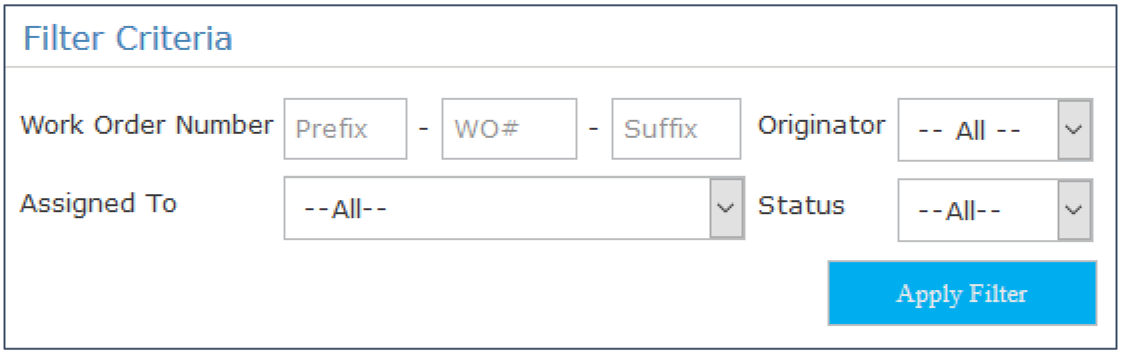
Created Date	Originator Name	Assigned To	Status	Room/Location	Description	Work Order #
6/4/2019	Darlene Peters		Approved	Classroom, NP-1	There is a water leak under the sink in the Staff Break Room.	FY18-19-00378
5/24/2019	Darlene Peters		Assigned to Supervisor	Multi-Use Room, Multi-Use Room	Door doesn't lock	FY18-19-00183

The **Status** column gives you the following information:
(When the status changes, the person who created the work order will receive an email update.)

- **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.

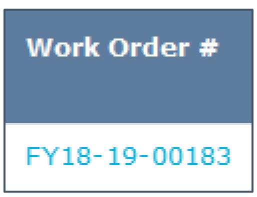
Created Date	Originator Name	Assigned To	Status	Room/Location	Description	Work Order #
1/29/2020	Darlene Peters		Pending Haz Mat Approval	A-wing Staff Room	The sink has a slow leak.	FY19-20-00089

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.



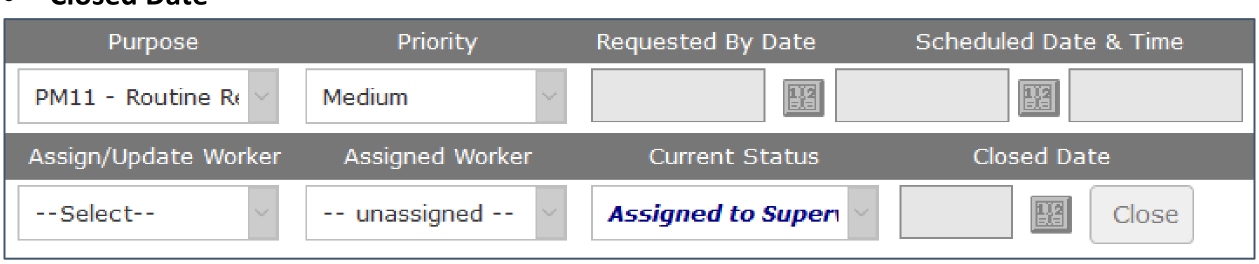
You can print out all the open work orders by clicking on the **Batch Print Active WO's** button.

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

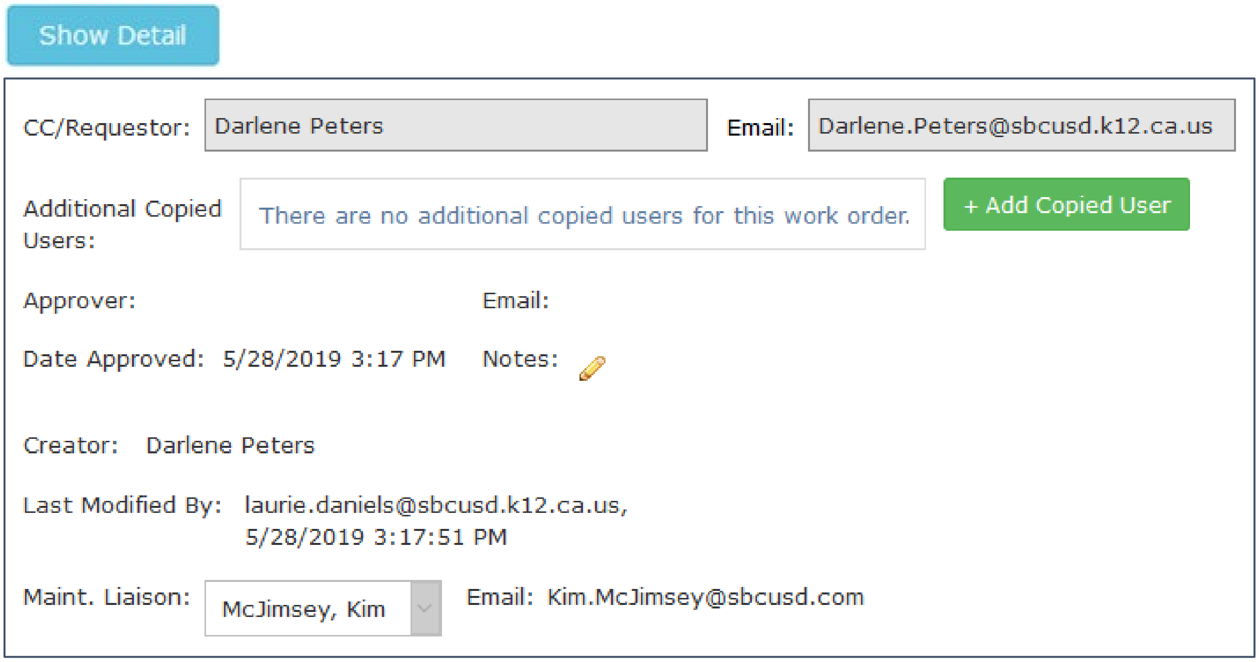


The following information will display:

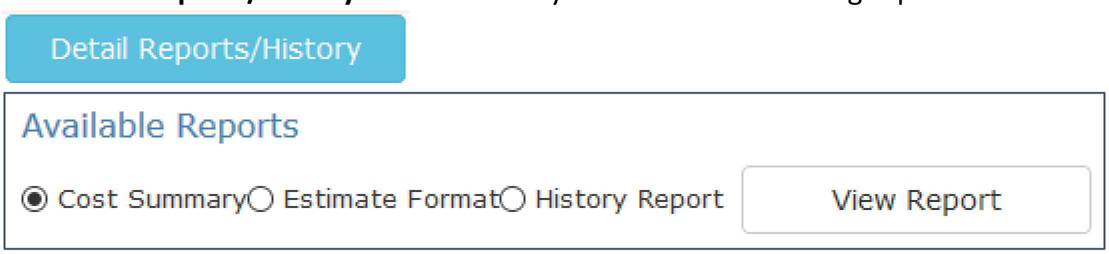
- **Purpose** (type of work order)
- **Priority**
- **Requested By Date**
- **Scheduled Date & Time**
- **Assigned Worker** (staff person assigned)
- **Current Status**
- **Closed Date**



The **Show Detail** button displays the following information.



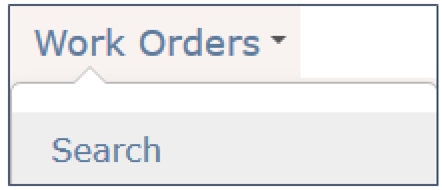
The **Detail Reports/History** button allows you to run the following reports.



SEARCH FOR A WORK ORDER

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.

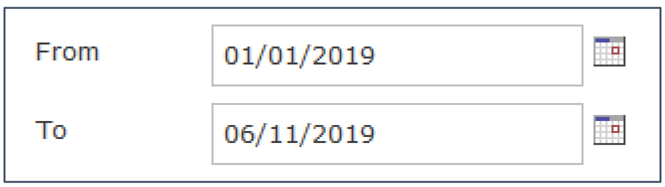
-or-



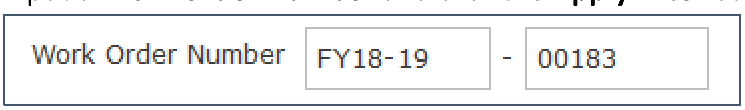
1. Mouseover **Work Orders** and choose **Search**.

2. Use any 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.

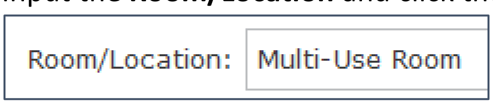
   - Select a date range and click the **Apply Filter** button.



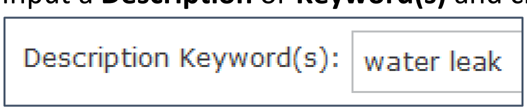
   - Input a **Work Order Number** and click the **Apply Filter** button.



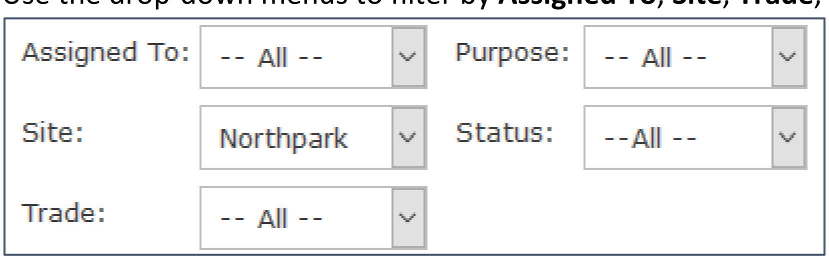
   - Input the **Room/Location** and click the **Apply Filter** button.



   - 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**.



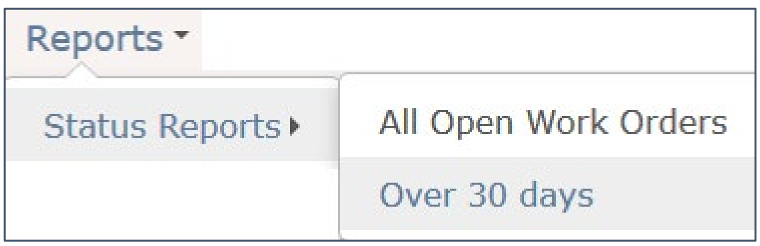
GENERATING STANDARD REPORTS

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).

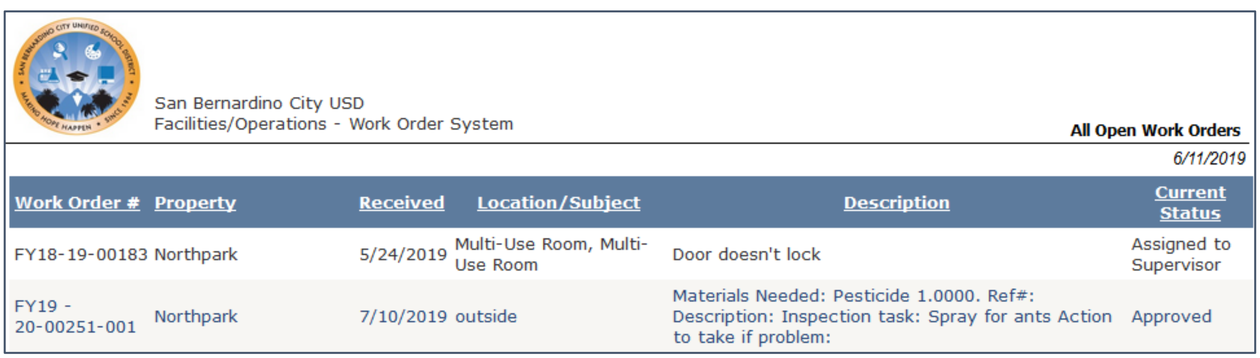
Standard Reports:

- **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.



The report will generate.



San Bernardino City USD
Facilities/Operations - Work Order System

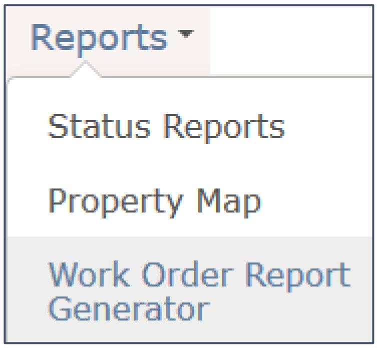
All Open Work Orders
6/11/2019

Work Order #	Property	Received	Location/Subject	Description	Current Status
FY18-19-00183	Northpark	5/24/2019	Multi-Use Room, Multi-Use Room	Door doesn't lock	Assigned to Supervisor
FY19 - 20-00251-001	Northpark	7/10/2019	outside	Materials Needed: Pesticide 1.0000. Ref#: Description: Inspection task: Spray for ants Action to take if problem:	Approved

GENERATING CUSTOM REPORTS

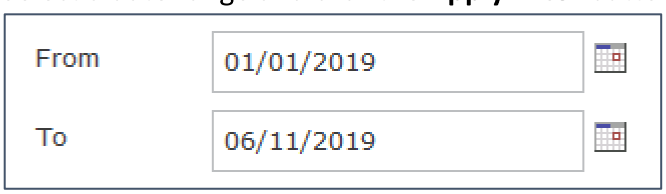
Custom reports can be created in the Report Generator. Use the report options shown below to customize your report. After choosing the options, click the Apply Filter button. The report will generate and the results will display at the bottom of the screen.

1. Mouseover **Reports** and choose **Work Order Report Generator**.

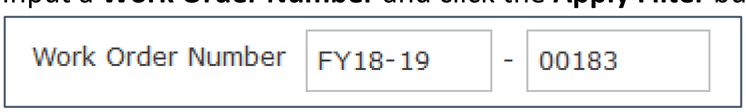


2. Select your report options.

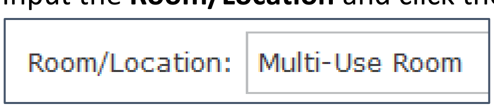
- Select a date range and click the **Apply Filter** button.



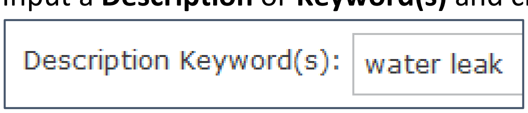
- Input a **Work Order Number** and click the **Apply Filter** button.



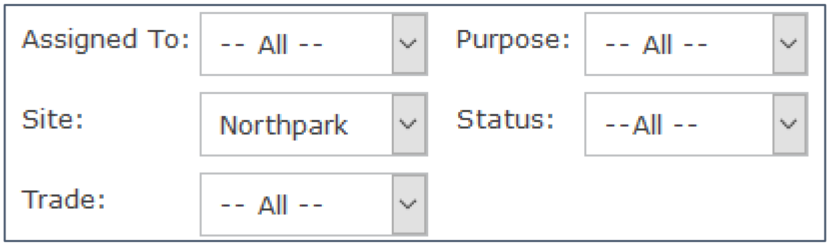
- Input the **Room/Location** and click the **Apply Filter** button.



- 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**.



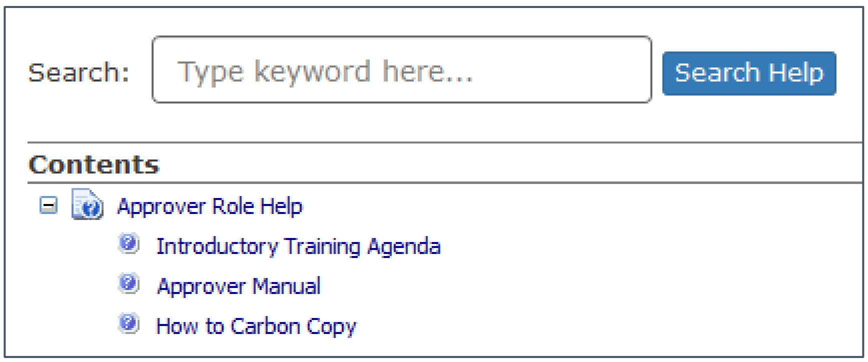
3. Click the **Apply Filter** button.

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**.

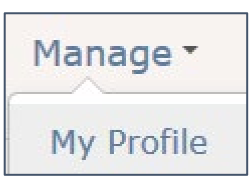
2. Click on the manual you wish to download –or- type a keyword into the **Search** field and click the **Search Help** button.



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.