



SP Marketplace SP Facilities Portal How-It-Works

Module Version 11.0



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Introduction

The SP Facilities Portals How-It-Works document reviews the application's functions from a business process perspective.

Portal Overview

The SP Facilities Portal product by SP Marketplace is a next generation facilities management solution that integrates process automation, staff collaboration, and an employee self-service portal. The SP Facilities Portal is a SharePoint site that provides two role-based portals, a Staff Portal where the department staff operates and an Employee Portal where the department's "customers" (employees) can submit workorders, access a knowledgebase and easily find resources that the department wishes to present to them. The goal of SP Facilities Portal application is to drive self-service for employees, and improve productivity and collaboration of the department staff.

Core to the application is providing facilities management services and support utilizing a workorder system, and tracking facilities and their assets. Additionally, it provides features to enhance department staff communication and collaboration.

Key elements of the application:

- Process oriented features
 - Facilities management and tracking
 - A full featured Service Desk system to track workorders
 - Change management to track change requests and larger Facilities projects with approval system
 - Asset management and preventative maintenance
 - Equipment management and preventative maintenance
 - Maintenance staff, contractors and vendors management
- Collaboration features
 - Knowledgebase
 - Document Libraries (Staff and Employee)
 - Task tracking
 - Calendars (meetings and schedules)

Use of the application is done through the portals which is separated by roles. The application automatically routes the user to the appropriate portal based on whether they are part of the Facilities staff or an employee needing services or resources.

The Facilities Staff Portal is designed as a place where the Facilities staff can work operationally every day, easily accessing the functions and resources they need to efficiently do their job. The Facilities Staff Portal has the following functionality:

- Workorder tracking and management
- Facilities and asset tracking
- Change request tracking and management

- Facilities staff who are offline tracking
- Equipment and vendors tracking
- Contractors tracking
- Knowledgebase (Staff)
- Collaboration features
- Work tracking – tasks, My Workplace dashboard
- Document management
- Facilities management reports and Dashboard

Additionally, a Facilities Employee Portal is included, which makes it easy for end users to submit tickets, and access a knowledgebase, documents and training links.

The Facilities Employee Portal functionality consists of:

- Workorder submission and status
- Knowledgebase
- Announcements
- Portal Documents
- Portal Links
- Live Contact
- Surveys (for submitting feedback)

The SP Facilities Portal is built on the Office 365 and SharePoint platform and leverages all the native Office 365 and SharePoint components and applications. The SP Facilities Portal therefore adapts to any future Microsoft 365 changes, and is also 100% customizable by SharePoint business power users. Add your exiting logo, graphics, live feeds from your favorite websites to have a Weather or Stock Ticker, Polls and more, or let our [SP Marketplace Customer Services](#) department customize your application and match your company brand for you. You may learn more information about our Managed Customer Services [here](#).

Main Portal Functions

Facilities Management

The core function of the SP Facilities Portal is to provide a system to manage and track the facilities of a company. Facilities can be associated with assets and to workorders. Facilities can have related documents such as floor plans or electrical plans.

Asset Management

Supporting facilities management is an asset management system for tracking and managing assets. Assets may be associated to a facility, but they don't have to be. Assets may be imported or manually entered in the Facilities Portal and updated accordingly for tracking purposes.

Assets may be associated with workorders as well as change requests. They may have documents attached to them such as instructions manuals or how-to guides. Assets may also have tasks assigned to them. Assets can be associated with a vendor, but they don't have to be.

Assets can be assigned preventative maintenance dates so that the Facilities department can see the upcoming maintenance due for assets on their Dashboard.

Workorder Management

In addition to facilities management, the SP Facilities Portal provides a workorder management system, such that the Facilities department may provide services and support to all employees of a company.

Employees may use the Facilities Employee Portal to submit workorders, access a knowledgebase and easily find resources that the Facilities department wishes to present to them. Facilities department staff can manage the workorders using the Staff Portal, communicate with those employees as well as communicate and collaborate with their Facilities team members.

Workorders can be associated with a facility, but they don't have to be. When new workorders are submitted, the Facilities department is automatically notified of the new workorder request. Likewise, the submitter is notified as their workorders progress through their various phases.

Workorders may have documents attached to them such as supporting documentation that would be helpful to complete the workorder. Workorders may also have tasks assigned to them.

Workorders may be linked to a single asset that exists in the assets list, but they don't have to be. They may also be associated with one or more equipment items in the equipment list. Workorders may be linked to a contractor, but they don't have to be.

Workorders may also be associated with other workorders in the event that multiple workorders were submitted for the same issue.

Change Management

Supporting workorder management is a change management feature for tracking change requests and larger Facilities projects. Change requests may be created from a workorder, and therefore linked to the workorder, or created as stand-alone projects. Change requests may be associated with assets and may also have tasks assigned to them.

Equipment Management

Also supporting workorder management is an equipment management system for tracking and managing equipment. Equipment may be associated to a facility, but they don't have to be. Equipment may be imported or manually entered in the Facilities Portal and updated accordingly for tracking purposes.

Equipment may be associated with a vendor, but they don't have to be.

Equipment can be assigned preventative maintenance dates so that the Facilities department can see the upcoming maintenance due for equipment on their Dashboard.

Facilities Staff Management

Workorders are often assigned to facilities staff who are not included in the Microsoft Office 365 environment. The SP Facilities Portal allows you track these facilities staff and assign workorders to them. They will be notified via email of their assign workorders. Facilities Staff may be assigned to a specific facility, but they don't have to be.

Vendors Management

The SP Facilities Portal allows you to track vendors. Equipment in the equipment list can then be associated with a vendor. Assets may also be associated with a vendor.

Contractors Management

The SP Facilities Portal allows you to track contractors. Workorders may then be assigned to contractors.

Portal Design

The SP Facilities Portal is an operational portal that provides a template solution to enhance an organization's use of Microsoft Office 365 and SharePoint implementation. This template was designed with the objective of meeting the most common Facilities departmental support requirements of mid-range organizations with 50 – 2000 employees. This application won't meet every organization's full set of requirements out-of-the-box, rather it will accelerate the SharePoint deployment by delivering 80-95% of the functionality and allowing the organization to add the remaining 5-20%.

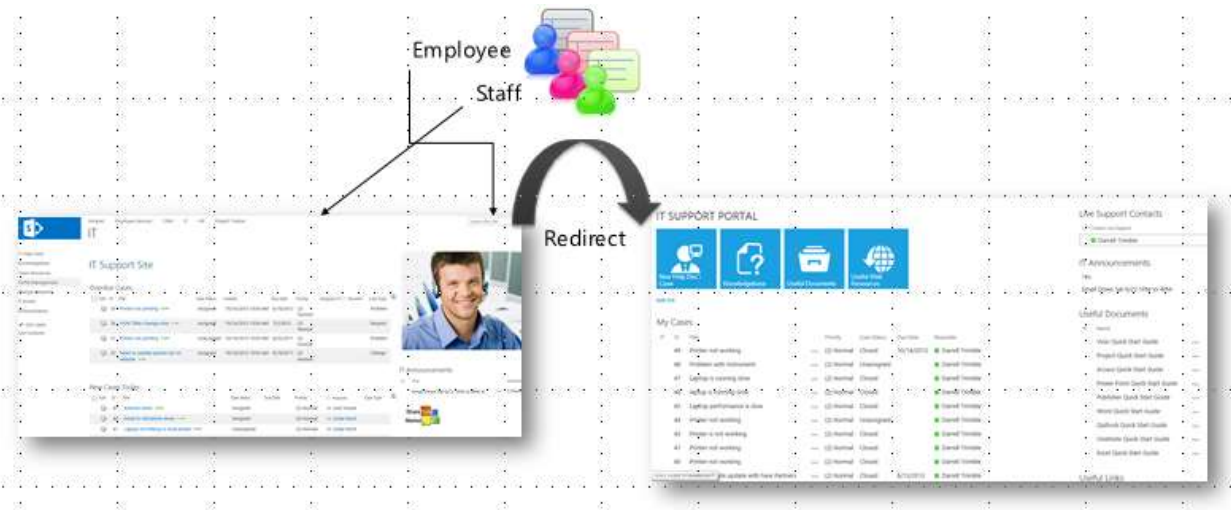
Role Based Portals

The SP Facilities Portal is designed with two audiences in mind, the Facilities department staff and all other employees (end users). The core processing of the SP Facilities Portal is to capture, track and manage Facilities workorders (or tickets) and automate workorder status communications with the employee. The core objects of management are facilities and assets and their availability to Facilities' customers (employees).

In support of these two audiences, the application provides for two role based portals. The Employee Portal allows employees to submit workorders, review workorder status, and if possible, resolve the workorder/issue themselves through a knowledgebase, support materials, or by linking to resources like online tutorials. The Facilities Staff Portal allows Facilities department staff to manage workorders, manage assets, collaborate with other Facilities staff, manage change requests, manage preventative maintenance, vendors and contractors, manage the knowledgebase, and control what documents and resources the employees can access in the Employee Portal.

It is important to understand that based on what SharePoint Group a person belongs to, what is presented to the end user (Employee Portal page) versus the department staff (Department Staff Portal page) is different.

Access to the portals is controlled by a page re-direct type of feature. When a user links to the Site URL, this feature determines whether the user is part of the Facilities Staff group, and if yes, presents the Facilities Staff Home page. If the user is not part of the Facilities Staff permission group, then it routes the user to the Employee Portal Page. In the Employee Portal, the employee can only see their workorders by filtering on who created the workorder.



Enhanced Forms and Super Views.

A key component of all the SP Marketplace application templates is to utilize enhanced forms which allow the users to see everything related to the workorder all in one place, sometimes referred to as Super Views.

Workorders

General
Details-Status
Worklog
Knowledgebase
Tasks
Documents
Change

Title *
Enter a brief description of service requested

Facility

Location

Requester
Person making request

The template was designed with the features that were found to be most appropriate for SMEs, and is driven by best practice assumptions which include:

- Providing rules based forms which present a limited set of information to end users (the General Tab only) and show more information for Facilities staff
- Presenting category information at a level that provides for reporting but does not confuse the end user with complexity
- Creating notifications that are informative, but not overdone (see workflows section)
- Keeping workorder work log information confidential from end users

- Using in-ticket correspondence with end-users, rather than attaching a multitude of emails. This reduces storage requirements and enables search features when managing workorders
- Providing cross-list access to relevant lists and libraries, thus eliminating the need to leave the Service Request record in order to access additional information needed to resolve the issue
- Allowing the ability to create knowledgebase articles from a workorder

Related Resources

- *SP Facilities Portal – Quick Reference V11*

Roles and Security

An important factor for a successful implementation is to appoint an SP Marketplace Application Administrator (SPMP Administrator) responsible for the application who will focus on learning the SharePoint platform and the SP Facilities Portal. This person does not have to be a skilled Facilities technician, rather a tech savvy business user will suffice. The level of knowledge is that of a SharePoint business power user. We have a curriculum available on our site that can train you in a matter of hours - go to <http://www.spmarketplace.com/training-services.html> .

After over 1200 implementations we have found this to be the single defining factor between success and failure. SharePoint is not like a database, nor a software program. It is different kind of platform, so learning the basic functionality of this platform will provide a tremendous amount of value. The upside of learning this basic knowledge, will be a smooth implementation and the ability to make desired customizations.

This basic SharePoint knowledge will also help the SPMP Administrator understand what SharePoint customizations are possible, or not. Like any platform, it has its limitations. Even though SharePoint runs on the web, it is not your typical HTML site.

Governance is more than just having a responsible SPMP Administrator. Governance also includes managing access through groups and retention policies on different data and documents.

Permissions

The general structure of access for these sites and the default Quick Start permissions at setup is as follows:

| Role | Description | Permission Level |
|------------------------------|--|---|
| Administrator | Your company's SPMP Administrator | Full control of the SharePoint system |
| Staff | Facilities staff who manage workorder system workorders submitted by end users | Access to the Employee and Staff Portals Edit workorders and manage the presentation of information on the Facilities Portal pages |
| Employees (End Users) | The people who need to submit a workorder | Access to the Employee Portal Create, and edit only their own workorders |

Navigation

Top Level Navigation

The navigation may be customized as desired. Out-of-the-box functionality provides this top-level Navigation.



The Top Navigation Bar is home to most of the functions in the SP Facilities Portal. The SPMP Administrator is free to change this navigation by adding or deleting menu items using standard SharePoint Navigation in the Site Settings function. Controlling what navigation items show for which users is controlled by the Audience feature in the Navigation item.

Facilities Employee Portal Top Navigation

- **Intranet** – access the Intranet

Facilities Staff Portal Top Navigation

- **Workorders** Menu – need to update per Production changes
 - **New Workorder** – create a new workorder
 - **All Workorders** - access to all workorders
 - **Unassigned Workorders** - access all unassigned workorders
 - **My Workorders** – access to workorders assigned to me
- **Facilities Resources** Menu
 - **Portal Content** – manage content that appears in Employee or Staff Portals
 - **Facilities** – manage facilities
 - **Assets** – manage assets
 - **Change Requests** – manage change requests
 - **Equipment** – manage equipment used in facilities
 - **Facilities Documents** – documents relating to the facilities department
 - **Facilities Staff** – manage Facilities staff who are not on SharePoint
 - **Vendors** – managers vendors
 - **Contractors** – manage contractors
 - **Knowledgebase** – manage Knowledgebase articles
- **Staff** Menu
 - **Tasks** – manage Facilities staff related tasks
 - **Documents** – manage Facilities staff related documents
 - **Calendar** - manage the Facilities staff related Calendar
 - **Links** – manage the Facilities staff related events

Promoted Links

In addition to the top navigation, there are Promoted Links and Group Links sections that contains tiles with quick access links. The Group Links section will only appear for customers using SharePoint Online.

Facilities Employee Portal Promoted Links (Dashboard)

- **Workorder** – create a new workorder
- **Knowledgebase** – search the Knowledgebase
- **Useful Docs** – documents presented by department
- **Feedback** – submit feedback to department staff

Facilities Staff Portal Promoted Links (Dashboard)

- **Dashboard: Promoted Links (Tiles)**
 - **New Workorder** – create a new workorder
 - **Workorders** – manage workorders
 - **Facilities** - manage facilities
 - **Assets** – manage assets
 - **Reports** – access to department reports
 - **Dashboard** – access to Power BI (not out-of-box)
 - **Employee Portal** – open the Employee Portal
- **Dashboard: Office 365 Group Links (Tiles)**
 - **Group** – quick link to Office 365 internal Groups
 - **Calendar** – quick link to Office 365 company Calendar
 - **OneDrive** – quick link to Office 365 company OneDrive
 - **Conversations** – quick link to Office 365 company conversations
 - **Delve Board** – quick link to Office 365 Delve board to see real-time company activity
 - **Planner** – quick link to Office 365 company Planner
 - **Yammer** – quick link to Office 365 company social boards
 - **Teams** - quick link to Office 365 company Teams group chats

The Administrator menu item is only available to the SP Administrator and includes product setup and configuration, license management and a link to the SP Marketplace Customer Portal.

Portal Content Management Page

Facilities staff have access to manage the content appearing on both the Facilities Staff Portal and the Facilities Employee Portal. All portal content can be managed by selecting Portal Content from the Facilities Resources menu.

Staff Portal Content Management

Staff Announcements: Manage staff announcements that appear on Staff Portal Home page.

Dept News: Manage the department news which appears on both Staff and Employee Portals. The Active Content feature allows you to check the Publish to Portal checkbox to push news to the company Intranet. News will need to be approved by the Content Manager before published.

Employee Portal Content Management

Dept Announcements: Manage department announcements that appear on the Employee Portal page. The Active Content feature allows you to check the Publish to Portal checkbox to push announcements to the company Intranet. Announcements will need to be approved by the Content Manager before published.

Dept News: Manage the department news which appears on both Staff and Employee Portals. The Active Content feature allows you to check the Publish to Portal checkbox to push news to the company Intranet. News will need to be approved by the Content Manager before published.

Dept Events Calendar: Manage department events that appear on the Employee Portal page. The Active Content feature allows you to check the Publish to Portal checkbox to push events to the company Intranet. Events will need to be approved by the Content Manager before published.

Useful Links: Manage Useful Links which are presented to Employees.

Useful Documents: Manage Useful Documents which are presented to Employees. Upload documents from a local computer or from the cloud.

Manage Feedback: Manage Employee Feedback results. Use the Actions menu item to setup personal alerts or to export the feedback data. Use the Settings menu item to manage or add new feedback questions. Use the two lower links to see the feedback.

Open Employee Portal: Open the Employee Portal.

Data Relationships

The SP IT Portal runs around three primary data lists:

- Facilities
- Assets
- Workorders

and one supporting data list:

- Change Requests

Facilities

The SP Facilities Portal includes an integrated facilities management system. Facilities can be related to documents and assets specific to the facility. They can have workorders assigned to them.

The following diagram illustrates the data relationships for facilities.



Assets

The SP Facilities Portal includes an integrated asset tracking and reporting system. The Facilities asset tracking system cross references to workorders, change requests and tasks. Assets can have their own assigned documents, vendors and also be related to a facility.

The following diagram illustrates the data relationships for Facilities Assets.



Workorders

Workorders can be submitted by end users in the Facilities Employee Portal, by Facilities staff in the Facilities Staff Portal, or they can come in via email. Email submission setup is not an out-of-the-box feature, however can easily be configured by the SPMP Administrator (SharePoint On-premise requires an add-on product).

Once a workorder is created, it is assigned by a Facilities staff member and can be tracked in different views such as My Workorders, Overdue Workorders, Workorders by Category, and more. Workorders can be created for specific facilities or assets as well such as meeting rooms or printers. After a workorder is completed, Facilities staff members can create a Knowledgebase article from the workorder for future reference by technicians and users alike.

Infowise alerts and actions automate simple processes such as notifications to customers and technicians when a workorder is assigned. Workflows automatically create Knowledgebase Articles when created at the workorder level.

The following diagram illustrates the data relationships for workorders.



Change Requests

The SP Facilities Portal includes an integrated change request management system which cross references with workorders, tasks and assets. Change requests can be initiated from a workorder or an asset, and include an optional approval process.

The following diagram illustrates the data relationships for IT Change Requests.



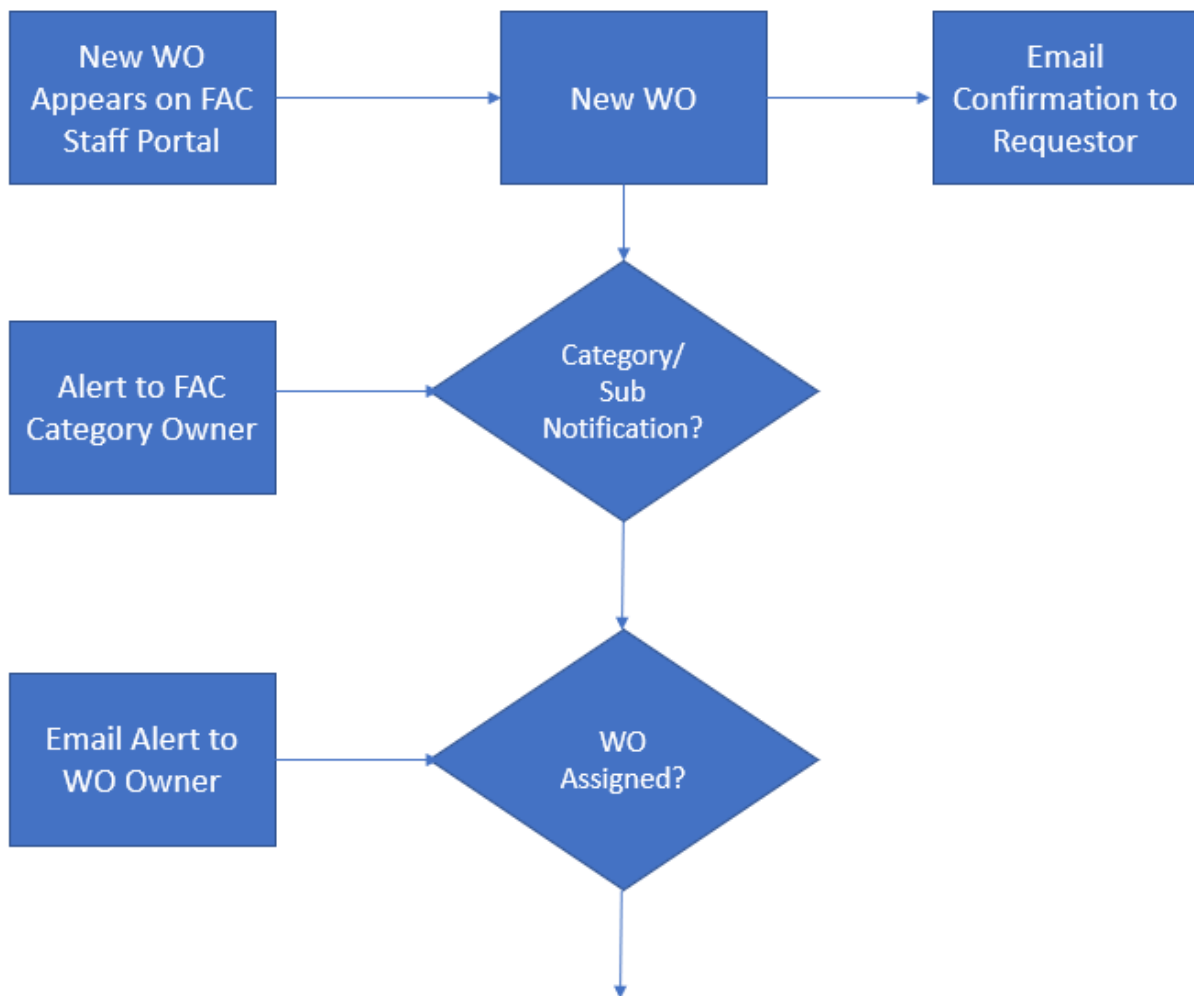
Processes

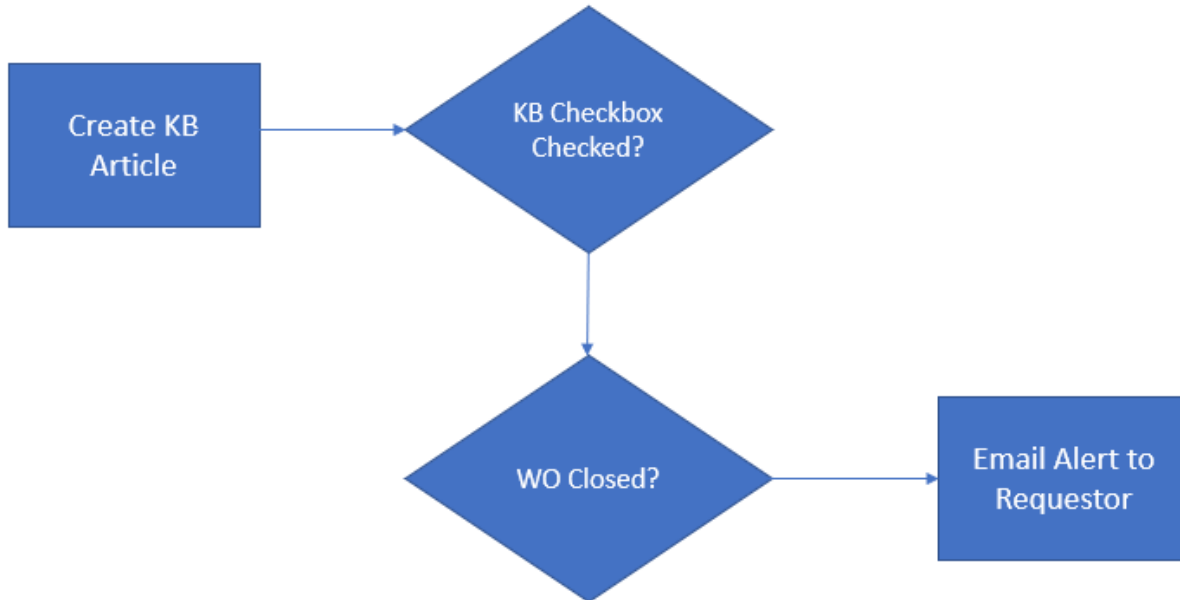
Workorder management includes business automation which are executed by Infowise alerts and actions. The following diagrams detail the automated business processes that occur in the Facilities Portal application.

Workorders

Infowise alerts and actions automate simple processes such as notifications to customers and technicians when a workorder is assigned.

The following flowchart illustrates the actions and alerts that occur in the SP Facilities Portal around workorder management.





Assets

Out-of-the-box functionality will cause assets to appear on the Staff Portal home page when their preventative maintenance is due alerting Facilities staff.

If an email notification is desired, the [SP Marketplace Preventative Asset Maintenance](#) solution pack is available to take this notification to the next level.

Other Components

Other application components of SP Facilities Portal include:

- Tasks
- Knowledgebase articles
- Document Library
- Announcements
- Useful Links
- Surveys (Facilities workorder system feedback)
- Live Support
- Reports
- Delve Discussion Board (if customer utilizing Microsoft Office Delve feature)
- Facilities Calendar

Appendix

Document Change Log

| Date | Description |
|------|-------------|
| | |
| | |
| | |
| | |