

Introduction

The SP Facilities Portal application 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 application is to capture, track and manage Facilities workorders (or tickets) and workorder status communications with the employee. The core objects of management are Facilities assets and their availability to Facilities customers (employees).

Facilities Staff Portal – Dept Staff

Workorder Management

A. Create New Workorder

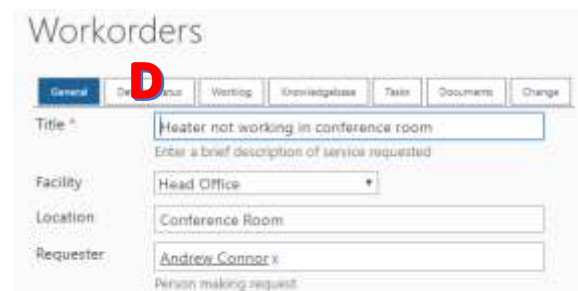
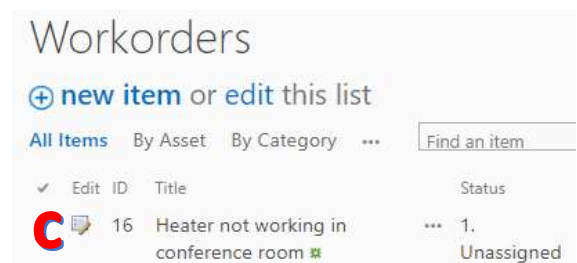
1. Click the **New Workorder** tile
2. Enter a **Title**
3. Select a **Category**
4. Select a **Subcategory**
5. Enter a detailed **Description**
6. Click the **Save** button

B. View Workorders

1. Click **Workorders** tile to see all workorders in queue and sort as desired
2. Click the ellipses (...) to see additional workorder views
3. Click **My Workorders** to see your assigned workorders
4. Click **Unassigned** to see all unassigned workorders

C. Edit Workorder

1. Click **Workorders** tile to see all workorders in queue and sort as desired
2. Open desired workorder by clicking on the **Edit** icon
3. Click **D: Detailed-Status** tab to Assign workorder
4. Click **D: Detailed-Status** tab to close Click **D: Detailed-Status** tab to Assign workorder:
 3. **Resolved** means IT Staff has completed their work to solve issue and is awaiting employee confirmation of resolution;
 4. **Closed** means all work is completed and issue is confirmed to be resolved



A: Create New WO

B: View WO's

C: Edit WO

D: Detailed-Status tab

Additional Workorder Information

- **D: Detailed-Status** tab - to edit workorder details including Facilities offline staff, contractor, related workorders, equipment or asset, and to create a KB article
- **E: Worklog** tab - to document work completed
- **I: Knowledgebase** tab – to manage the KB
- **F: Tasks** tab – to create case related tasks for other employees, company-wide
- **G: WO Docs** tab – to attach workorder related documents
- **H: Change** tab – to create workorder related change requests

I: Manage Knowledgebase Articles

- Select **Knowledgebase** from the Facilities Resources menu to open the Knowledgebase list
- Navigate to desired article, click the **Edit** icon to edit article

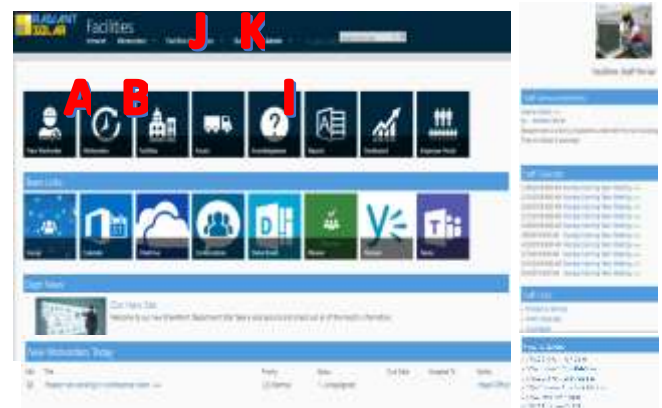
Other Facilities Portal Functions

J. Facilities Resources Menu

- Access **My Workspace**
- Manage **Portal Content**
- Create and Manage **Facilities**
- Create and Manage **Assets**
- Create and Manage **Change Requests**
- Create and Manage **Equipment**
- Create and Manage **Facilities Documents**
- Create and Manage **Facilities Staff**
- Manage **Vendors**
- Create and Manage **Contractors**

K. Staff Menu

- Access and Manage staff **Tasks**
- Access and Manage staff **Documents**
- Access and Manage staff **Calendar**
- Access and Manage Staff **Links**



- A:** Create New WO
- B:** View WO's
- C:** Edit WO
- D:** Detailed-Status tab
- E:** Worklog tab
- F:** Tasks tab
- G:** WO Docs tab
- H:** Change tab
- I:** Manage Knowledgebase Articles
- J:** Facilities Resources menu
- K:** Staff menu

