Facilitron Works
APP USER GUIDES

1 GETTING STARTED

- DOWNLOADING THE APP
- LOGGING IN
- NAVIGATING THE MY ORDERS SCREEN

2 MAKING UPDATES

- CHANGING WORK ORDER STATUS
- ADDING ACTIONS
- MAKING A COMMENT

3 ADDING COSTS

- ADDING COSTS BY CATEGORY
- COST CATEGORIES: LABOR, MATERIALS, OTHER
- TRACKING LABOR HOURS

4 CLOSING OUT

- CLOSING A WORK ORDER

facilitron® WORKS

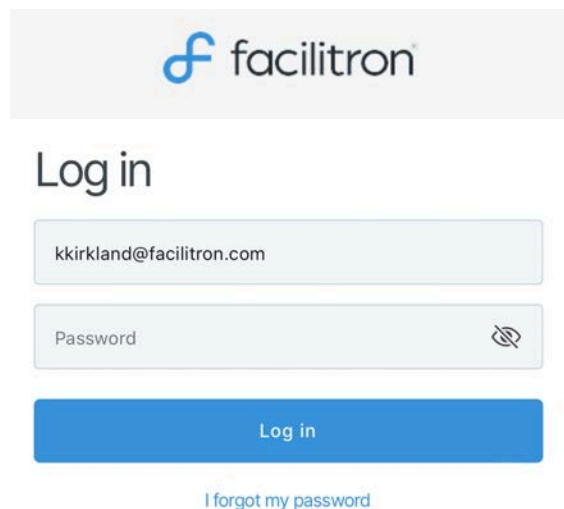# How to Download the Works App
Available for both iOS and Android devices

1. **Download the App** by going to the App Store for iPhone or iPads or the Play Store for Android

Download for Android

Download for iOS

> **Note:** If you've already downloaded the app, make sure that it's updated to the latest version.

2. **Search for Facilitron Works**

3. **Download** or install the Facilitron Works App, which is free to download and use

4. **Open the App** once the download is complete

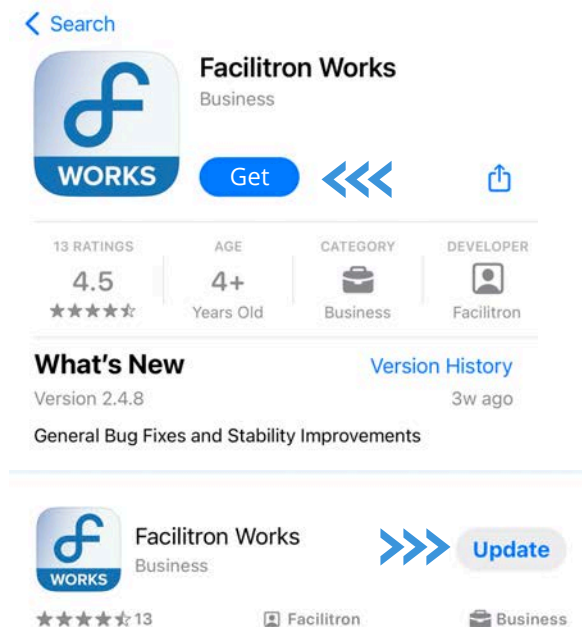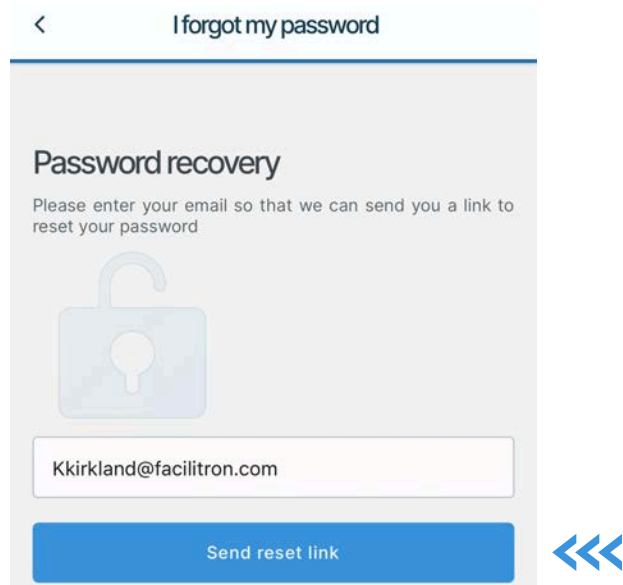5. **Sign in using Facilitron Works email and password**

Forgot your password?
1. Select **Forgot My Password** on desktop or mobile
2. **Enter your email** used to log in and **send reset link**
3. Open the email and **reset your password**
4. **Navigate back to the Works app** and log in

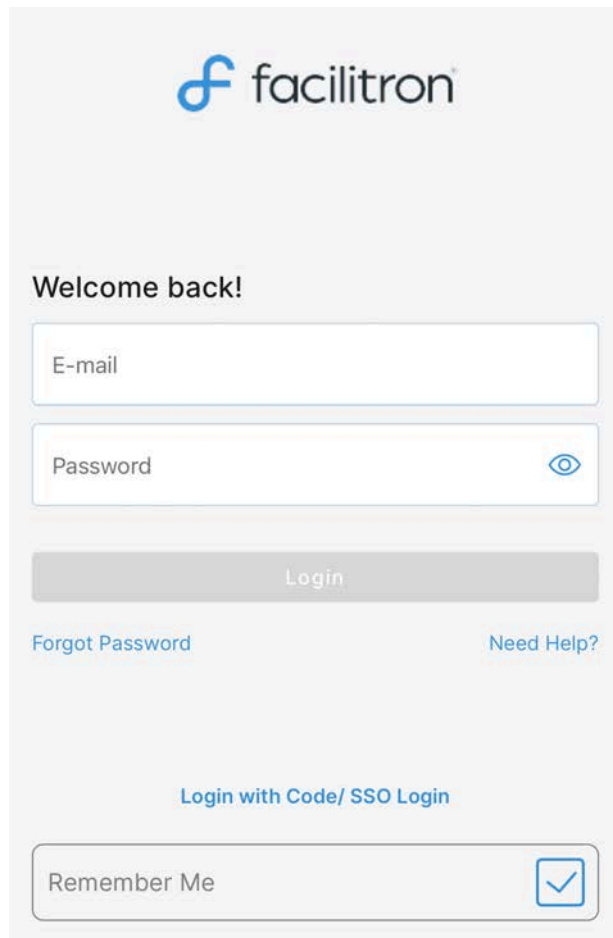For additional support, contact your Account Manager, visit support.facilitron.com or call 1-800-272-2962.

Logging Into Facilitron Works

Open the Facilitron Works app or start by downloading it from the App Store or Google Play Store

Log in using your same Facilitron email address and password from the desktop application at
maintenance.facilitron.com

Check the **Remember Me** button at the bottom of the screen to save your login credentials for next time.

Log in Using Single Sign On (SSO)

First, access Facilitron Works on your desktop using the retrieve log in code. Next, click on the person symbol at the top right and select **Login to Mobile App**

Do not close this screen that pops up as you open Facilitron Works on your mobile device.

Open the Works App and select **Log in with Code/ SSO Login** at the bottom of the screen

Next, enter the code from the desktop screen or scan the QR code as directed.

For additional support, contact your Account Manager, visit support.facilitron.com or call 1-800-272-2962.

Navigating the My Orders Screen

The My Orders screen is akin to the Incoming screen in the web application of Facilitron Works. Here you'll be able to see relevant work order details including the work order number and priority.

1. Open the Facilitron Works app and log in. The app will default to showing you the **My Orders** screen.
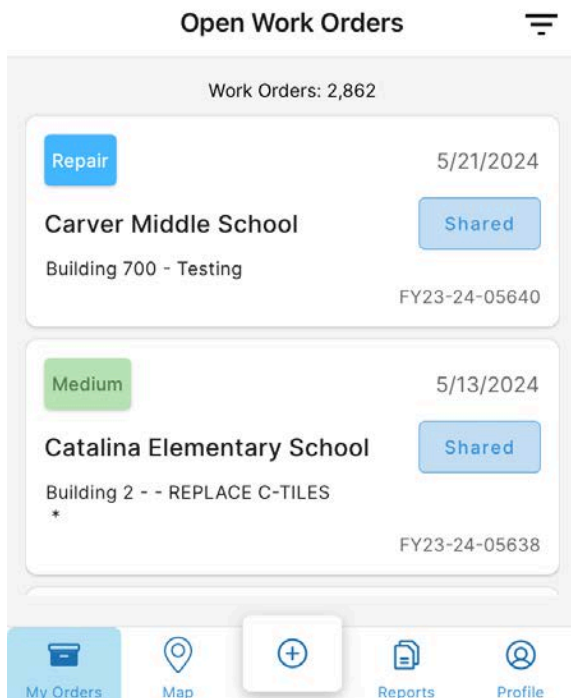
From the My Orders screen you can view **priority**, **location**, **work order number** and whether it's a **shared work order**.

2. If you do not see any work orders, or as many as you had expected, change the filters by tapping the funnel icon in the top right corner
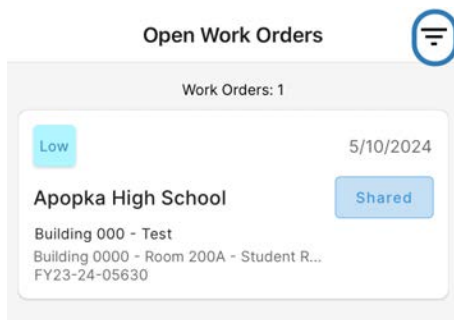
3. **Include Shared** enables you to see all work orders across your trade. After selecting helpful filter items, click the **Apply Filter** button located towards the bottom of the screen.
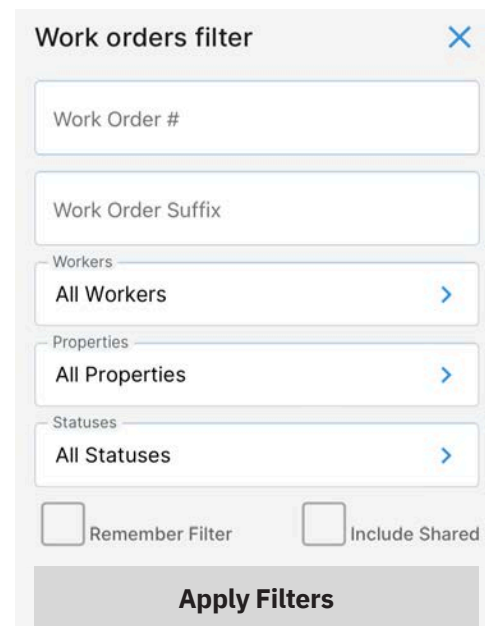
4. From here, tap any relevant work order tile to access that work order's information.

For additional support, contact your Account Manager, visit support.facilitron.com or call 1-800-272-2962.

Changing the Status of a Work Order

1. Go to **My Orders** and select the work order you wish to update

Open Work Orders

Work Orders: 2,862

Repair   5/21/2024
Carver Middle School   Shared
Building 700 - Testing
                          FY23-24-05640

Medium   5/13/2024
Catalina Elementary School Shared
Building 2 - - REPLACE C-TILES
*
                          FY23-24-05638

My Orders   Map   ⊕   Reports   Profile

2. Locate the status at the top of the work order

← **FY23-24-05630**   EDIT

Details   Comments

Low   ◀◀◀

Status
Received   >

Apopka High School

Note:
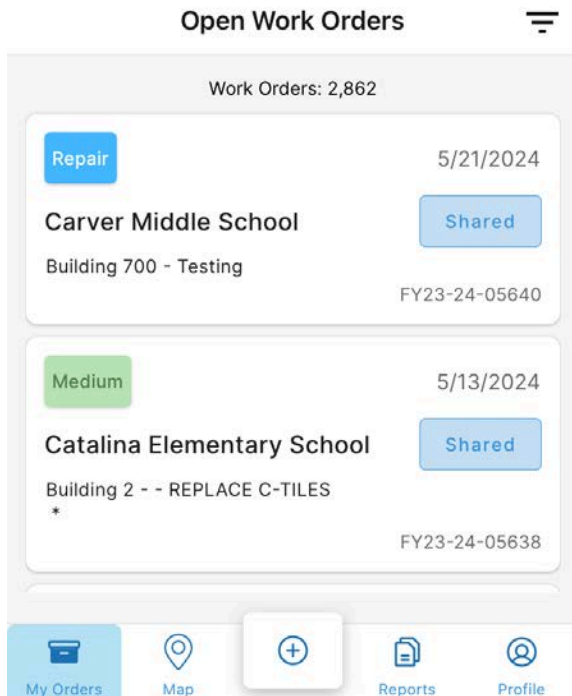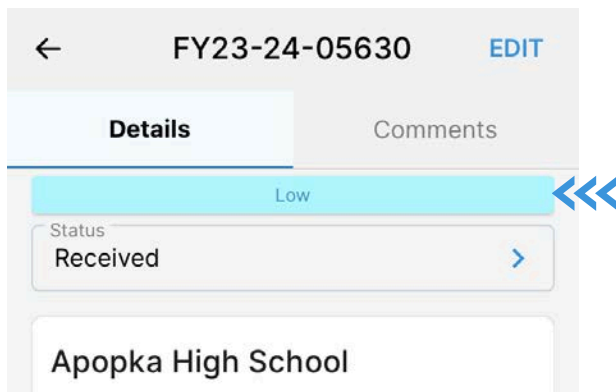After M&O receives and assigns the work order, the work order will appear on your screen with Received status. It could be another status, like Approved, if the work order was automatically assigned due to preconfigured work order settings.

3. Tap the status drop down to show other statuses available for selection. Scroll to find and select the new status

Clear Selection
Approved
Awaiting Funding
Backlog
Cancelled
Changed
Closed (pending review)
Closed/Completed
Denied
Duplicate
In Progress
Locked - Fiscal Year Closed
☑ Received   ◀◀◀
Returned for Information
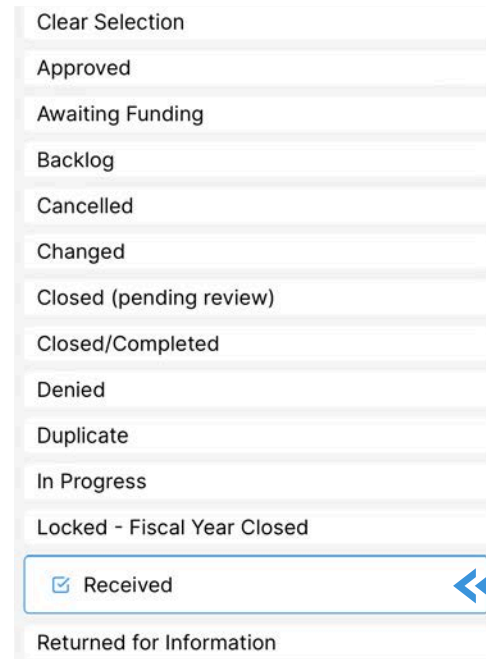
The current status will be selected by default.

4. After making your selection, you will automatically be taken back out to the work order detail page where you may save and update the work order with your selection

← **FY23-24-05630**   EDIT

Details   Comments

Low

Status
In Progress   > ◀◀◀

Apopka High School

Location
Building 0000 - Room 200A - Student Restroom (Male)

For additional support, contact your Account Manager, visit support.facilitron.com or call 1-800-272-2962.
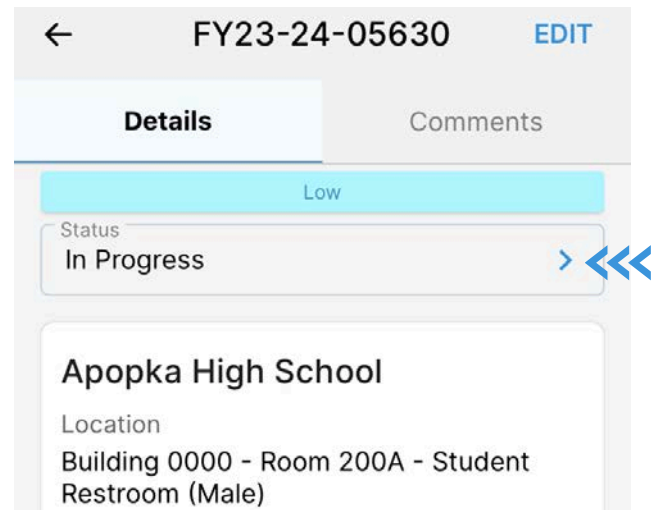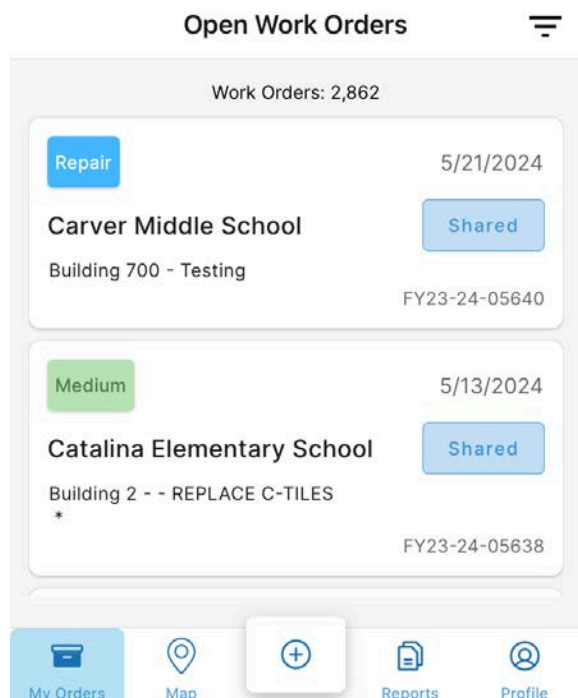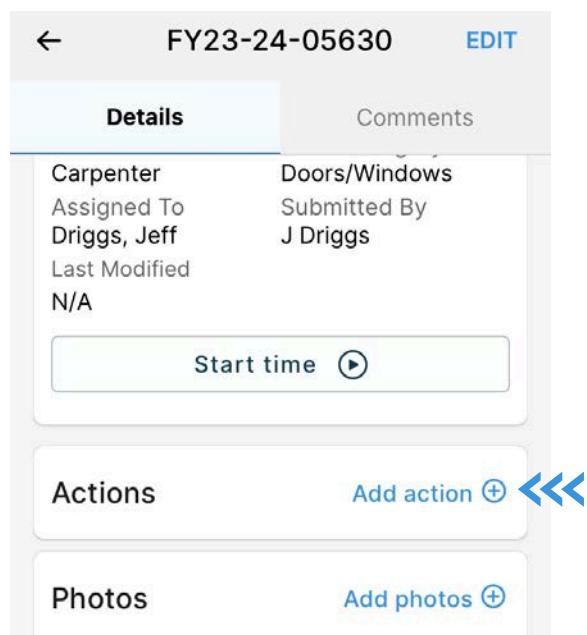
Adding Actions to a Work Order
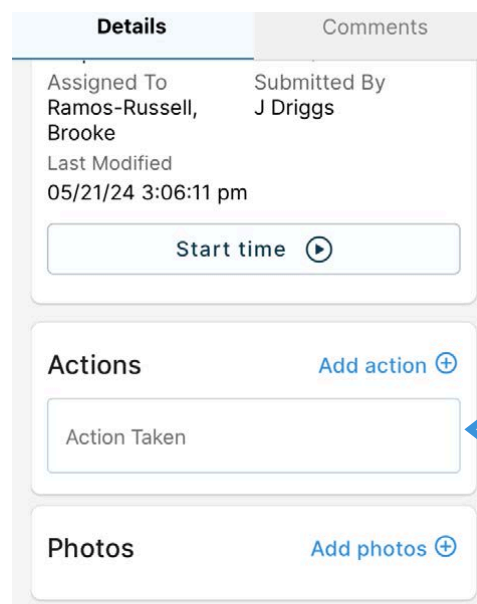
1. Go to **My Orders** and select the work order you wish to comment on

Open Work Orders

Work Orders: 2,862

Repair   5/21/2024
Carver Middle School   Shared
Building 700 - Testing
                                               FY23-24-05640

Medium   5/13/2024
Catalina Elementary School   Shared
Building 2 - - REPLACE C-TILES
*
                                               FY23-24-05638

My Orders   Map   ⊕   Reports   Profile

2. Scroll to bottom of the work order and see **Actions, Photos, and Costs** and click **Add action**

← FY23-24-05630 EDIT

Details   Comments

Carpenter   Doors/Windows
Assigned To   Submitted By
Driggs, Jeff   J Driggs
Last Modified
N/A

Start time ▶

Actions   Add action ⊕ ◀◀◀

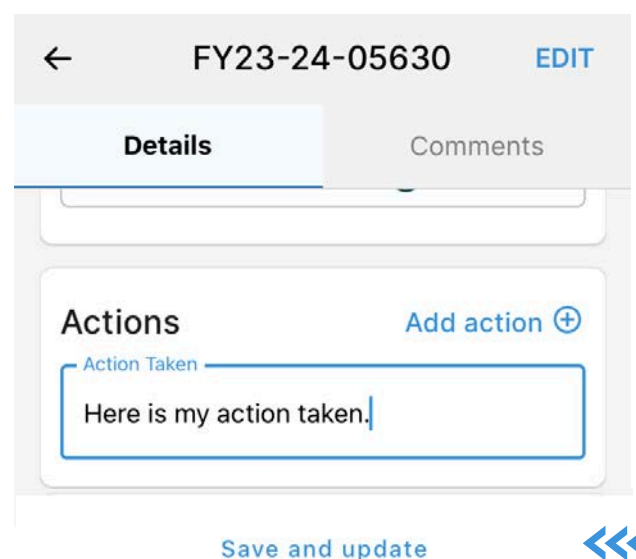Photos   Add photos ⊕

3. Add any actions taken on the work order by tapping the **Action Taken** textbox and type your response and click **Return** on your keyboard to review your entry.

Details   Comments

Assigned To   Submitted By
Ramos-Russell,   J Driggs
Brooke
Last Modified
05/21/24 3:06:11 pm

Start time ▶

Actions   Add action ⊕

Action Taken   ◀◀◀ **Note**: these
                    are required
                    to be entered
                    to complete
Photos   Add photos ⊕   a work order.

4. Click **Save and update** on the work order to log the action taken

← FY23-24-05630 EDIT

Details   Comments

Actions   Add action ⊕
Action Taken
Here is my action taken.

Save and update   ◀◀◀

For additional support, contact your Account Manager, visit support.facilitron.com or call 1-800-272-2962.

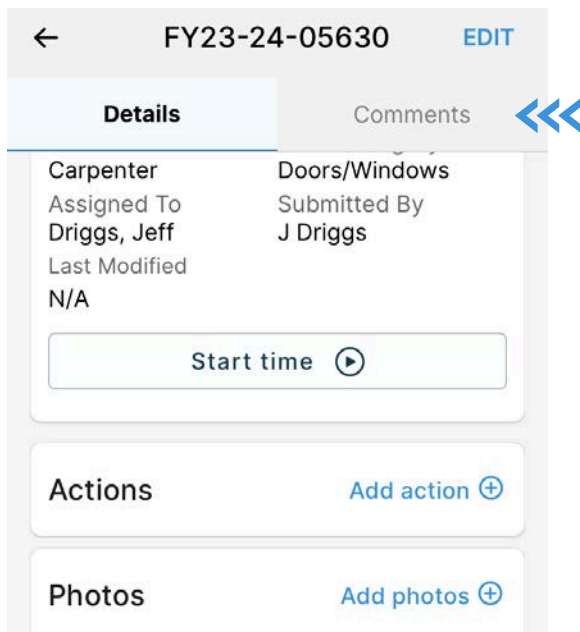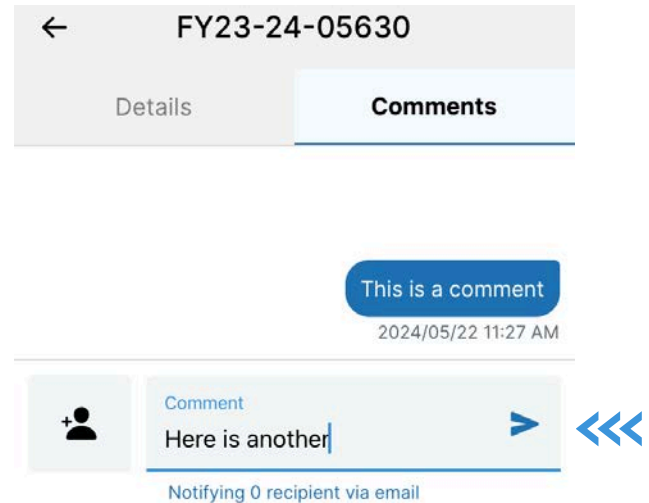# Adding a Comment to a Work Order

1. Go to **My Orders** and select the work order you wish to update
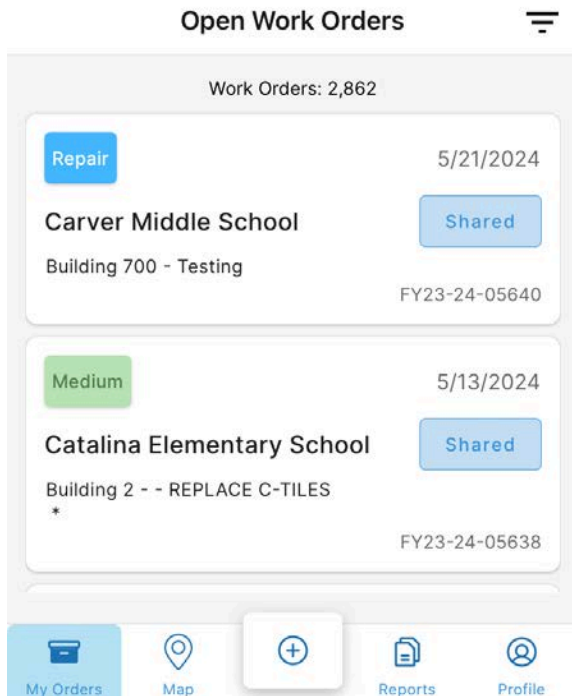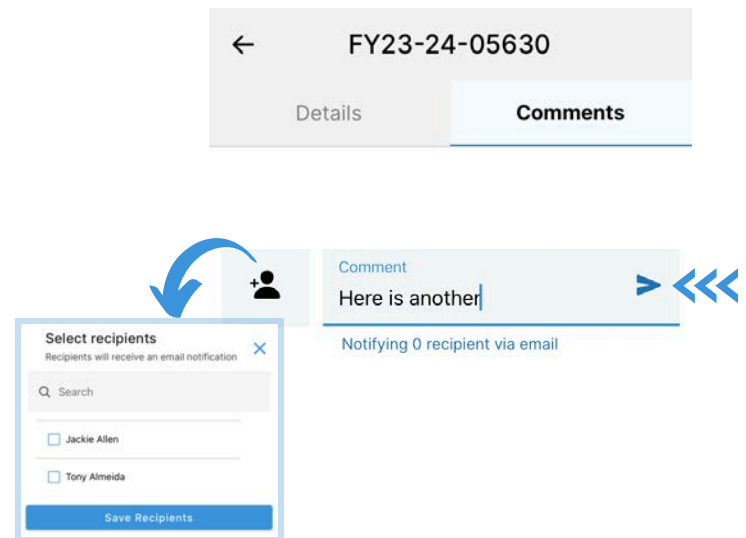

2. Tap the **Comments** tab

3. Tap in the comment box to begin typing. Click done or the blue arrow to post a general comment to the work order

4. To notify staff by email, click on the person icon, select your recipients and click **Save Recipients**. Then type your comment in the **Comment** box and click the blue send icon.
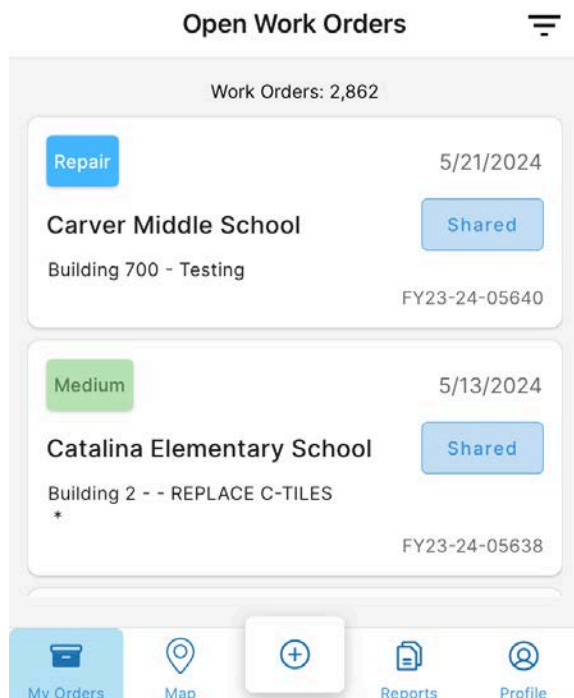

Note: If you leave a comment on another worker's work order, you automatically become a follower of that work order and will receive email updates on that work order's progress. If you do not wish to follow a work order after commenting, simply unfollow it.
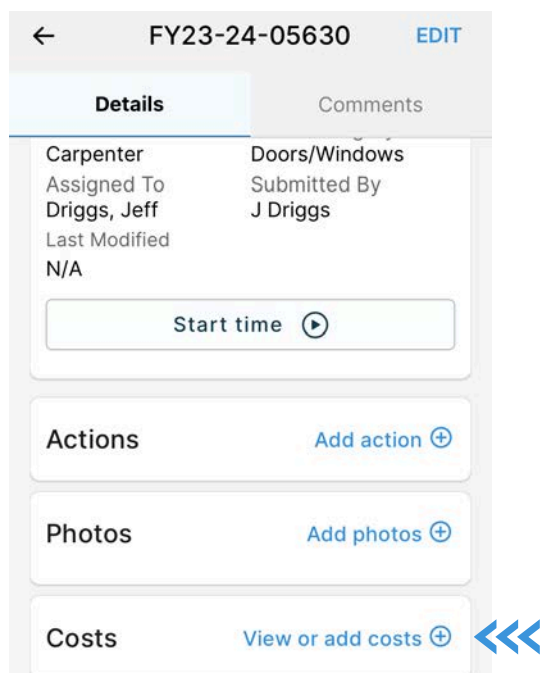
Adding Costs to a Work Order

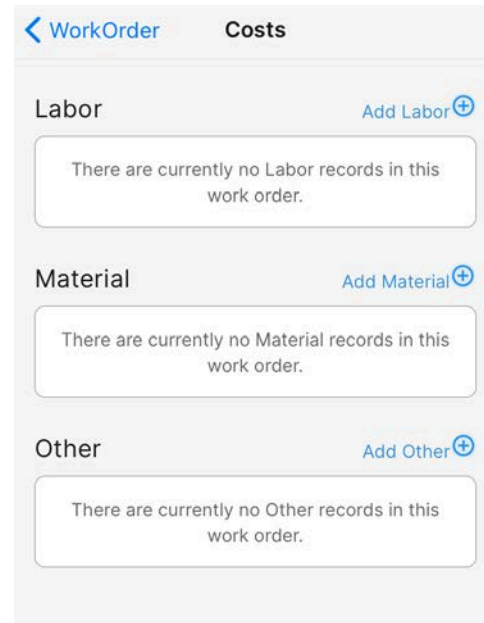1. Go to **My Orders** and select the work order you wish to update

Open Work Orders

Work Orders: 2,862

Repair	5/21/2024
Carver Middle School	Shared
Building 700 - Testing	
	FY23-24-05640

Medium	5/13/2024
Catalina Elementary School	Shared
Building 2 - - REPLACE C-TILES *	
	FY23-24-05638

My Orders   Map   ⊕   Reports   Profile

2. Scroll to bottom of the work order in the **Costs** section and click **View or add costs**

← FY23-24-05630   EDIT

Details   Comments

Carpenter   Doors/Windows
Assigned To   Submitted By
Driggs, Jeff   J Driggs
Last Modified
N/A

Start time ▶

Actions   Add action ⊕

Photos   Add photos ⊕

Costs   View or add costs ⊕   ⟨⟨⟨

3. Add any costs to the Labor, Materials or Other sections by clicking on the + icon next to the appropriate category

⟨ WorkOrder   **Costs**

Labor   Add Labor ⊕   ⟨⟨⟨ Check out more details about the different sections below.

There are currently no Labor records in this work order.

Material   Add Material ⊕

There are currently no Material records in this work order.

Other   Add Other ⊕

There are currently no Other records in this work order.

Cost Categories

Labor Costs

This section is used for **internal workers**. You can add the number of hours worked, the date worked, a PO/Invoice number, apply a budget code, change the worker as applicable, note the billable rate and add photos.

Material Costs

This section is designed to **log any inventory items** that are configured in the system as being used on the work order. You can note the date of consumption, which inventory item was used, the supplier, PO/Invoice number, quantity consumed, unit cost, sales tax, barcode, budget, notes and upload photos of receipts.

Other Costs

This section will track any additional **miscellaneous costs** that are not covered by Labor or Materials. You can log the date of the expense, total cost, include a brief description, PO/Reference number, apply a budget code, and upload a photo of the receipt.
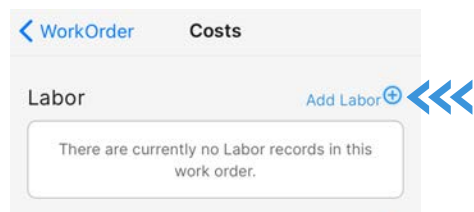
For additional support, contact your Account Manager, visit support.facilitron.com or call 1-800-272-2962.

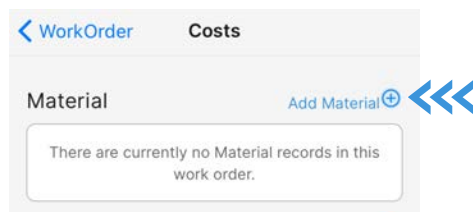# Adding Labor, Materials and Other Costs to a Work Order

Go to the Costs section of the work order and select your Cost category. Click the **plus (+)** icon to the right of the category to begin adding costs

Labor

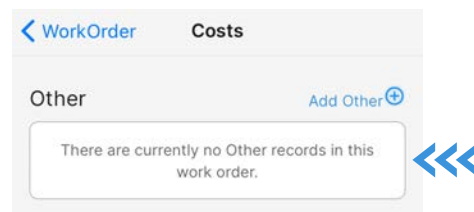| < WorkOrder	Costs	
Labor	Add Labor ⊕	◀◀◀
There are currently no Labor records in this work order.		

Add your # of hours worked, the date worked, worker, labor type, and other optional information such as: PO/Invoice number and Budget code. Upload any additional photos as needed.

Labor ✕

Hours

Labor Date
05/21/2024 📅

PO/Invoice Number (Optional)

Budget (Optional) >

Worker >

Labor Type
Regular Time >

Photo   Add photo ⊕

Save

⌃⌃ When you are done adding your costs, click **Save**

Material

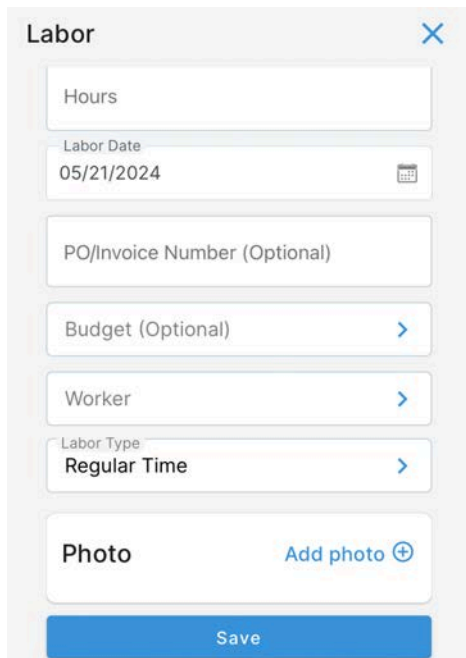| < WorkOrder	Costs	
Material	Add Material ⊕	◀◀◀
There are currently no Material records in this work order.		

Add the date of consumption, which inventory item was used, the supplier, PO/Invoice number, quantity consumed, unit cost, sales tax, barcode, budget, notes and upload photos of receipts.
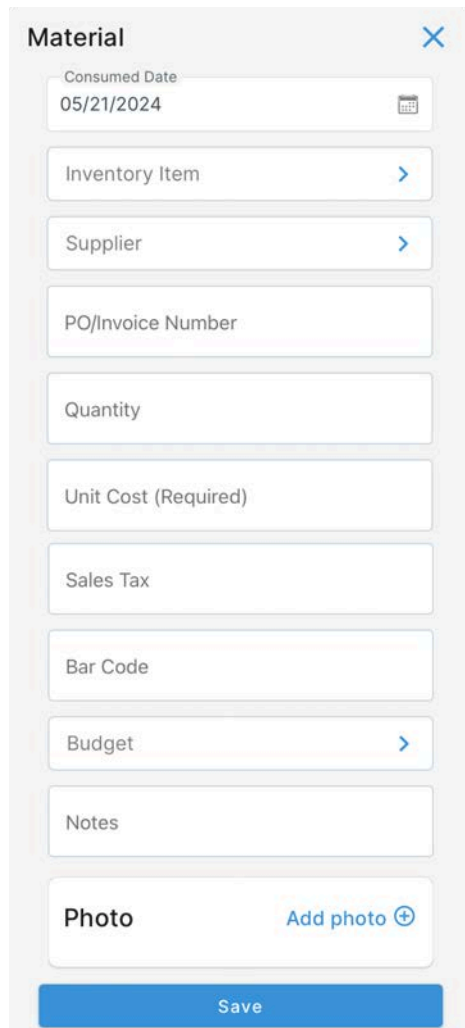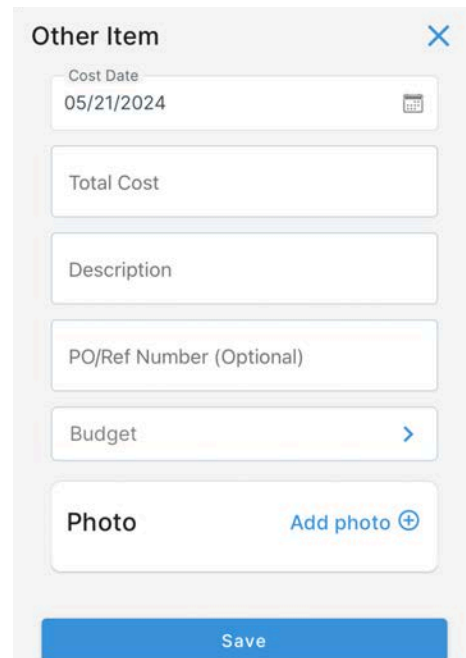
Material ✕

Consumed Date
05/21/2024 📅

Inventory Item >

Supplier >

PO/Invoice Number

Quantity

Unit Cost (Required)

Sales Tax

Bar Code

Notes

Photo   Add photo ⊕

Save

Other

< WorkOrder	Costs	
Other	Add Other ⊕	
There are currently no Other records in this work order.		◀◀◀

Add the the date of the expense, total cost, include a brief description, PO/Reference number, apply a budget code, and upload a photo of the receipt.

Other Item ✕

Cost Date
05/21/2024 📅

Total Cost
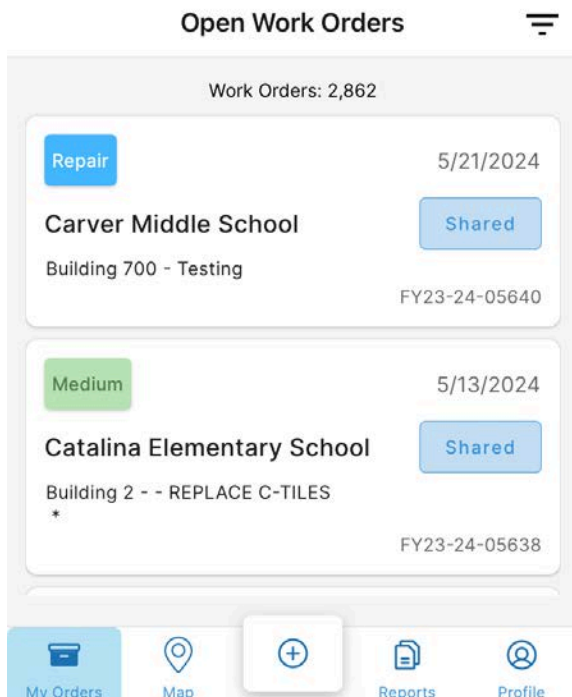
Description

PO/Ref Number (Optional)

Photo   Add photo ⊕

Save

Tracking Your Time in a Work Order

You can manually add your hours worked by going to **Costs** and clicking **Add Labor +** and enter your hours worked or you can use the stopwatch to track and log your hours in the actual work order.

1. Go to **My Orders** and select the work order you wish to update

Open Work Orders

Work Orders: 2,862

Repair	5/21/2024
Carver Middle School	Shared
Building 700 - Testing	FY23-24-05640

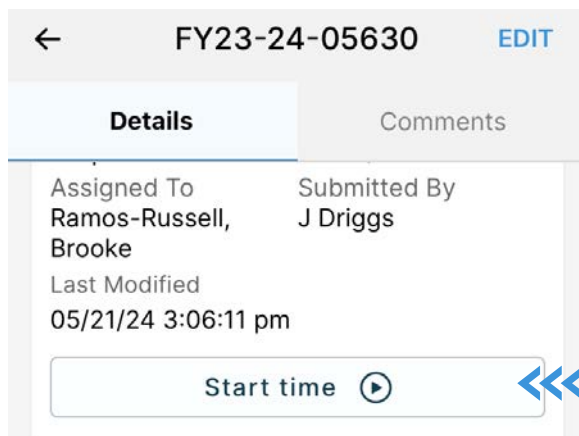|	
Medium	5/13/2024
Catalina Elementary School	Shared
Building 2 - - REPLACE C-TILES *	FY23-24-05638

My Orders | Map | + | Reports | Profile

2. Click on **Start time** to begin tracking your hours

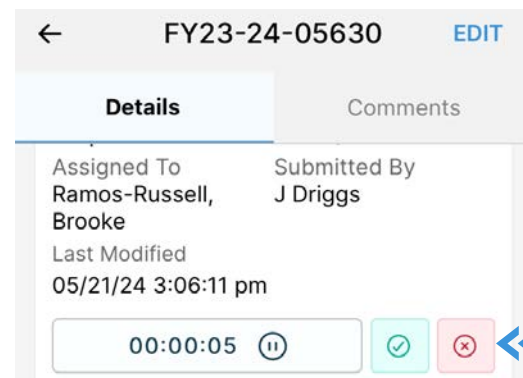← **FY23-24-05630** EDIT

Details | Comments

Assigned To: Ramos-Russell, Brooke
Submitted By: J Driggs
Last Modified: 05/21/24 3:06:11 pm

Start time ▶ «««

3. Once started, the timer will begin to count. When you're done, click the **green check** to stop the timer and log labor. You can also pause or cancel the timer.

← **FY23-24-05630** EDIT

Details | Comments
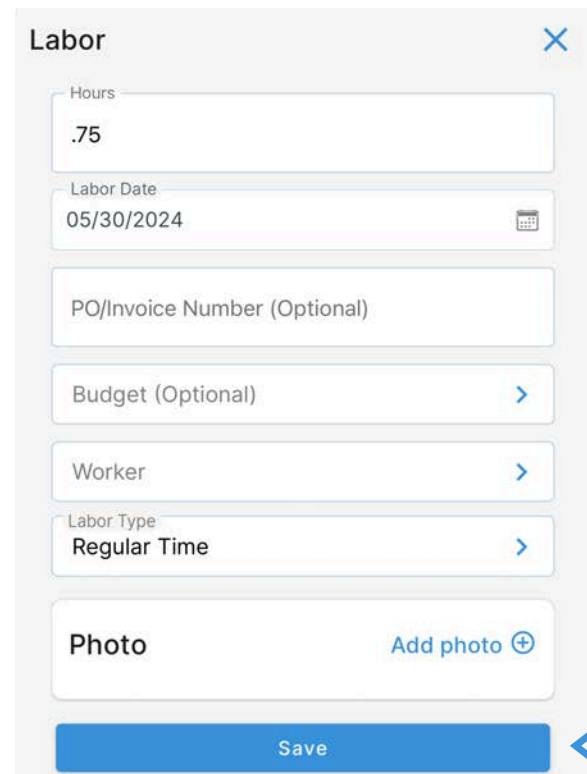
Assigned To: Ramos-Russell, Brooke
Submitted By: J Driggs
Last Modified: 05/21/24 3:06:11 pm

00:00:05 ⏸ ✓ ⊗ «««

Clicking the Red X to cancel the timer will pop up a prompt to confirm to avoid accidental cancellation.

4. After clicking the **green check** to stop the timer, log your information in the pop up (**Note**: your hours and the date will already be populated) Click **Save** when you're done.

Labor ✕

Hours: .75

Labor Date: 05/30/2024 📅

PO/Invoice Number (Optional)

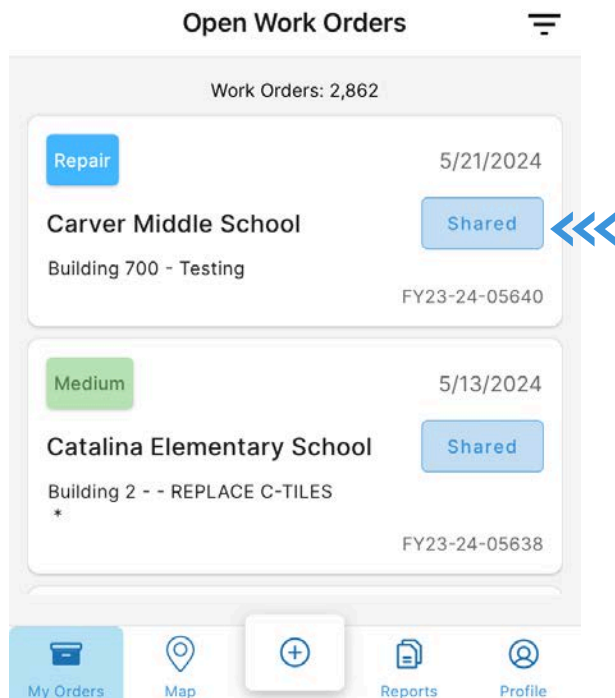Budget (Optional) >

Worker >

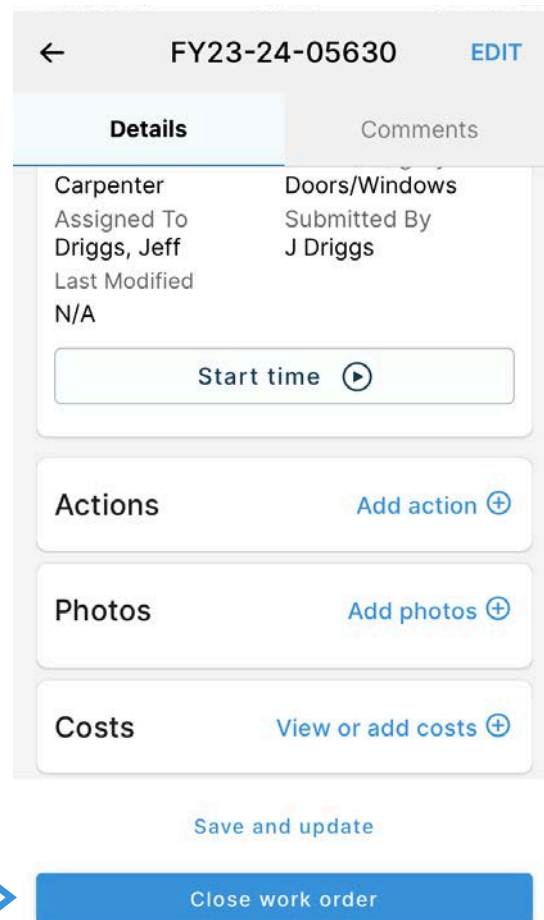Labor Type: Regular Time >

Photo — Add photo ⊕

Save «««

Closing a Work Order

1. Go to **My Orders** and select the work order you wish to update

2. At the bottom of the work order you will always see **Save and update** and **Close work order**.

Once the work has been completed and actions/time have been logged, select **Close work order** to close the work order and complete the process.

3. The work order is now closed. All changes have been saved, followers are notified by email and the ticket has been removed from the work queue.

For additional support, contact your Account Manager, visit support.facilitron.com or call 1-800-272-2962.