FACILITIES FEATURES

1. GENERAL FEATURES

- No additional hardware, software, or additional Office 365 services needed
- Built "natively" on Standard SharePoint, Teams and Power Platform
- 100% customizable through the SharePoint web interface, MS Flow and Power BI
- Supports SharePoint Server or SharePoint Online
- Designed to provide a consistent User Experience across Office 365
- Integrated with Office 365 services including
  - People (user directories, collaboration)
  - Office 365 Groups
  - Microsoft Teams
  - Yammer
  - OneDrive
  - Planner
  - Power BI for dashboards
- Pre-defined governance and security groups, just add users
- Connectivity to external systems through over 450 Office 365 Connectors
- Uses standard Active Directory or Office 365 user permissions
- Role based menu structure and forms
- Syncs with Microsoft Client Outlook (tasks, calendars, contacts)
- Well documented, and with links to relevant resources (docs, video etc) in the products.
- Change look & feel, color schemes, add your own logo without coding
- Responsive UI design for mobile devices
- Support for Tablets and Smart Phones
- Integrated with other SP Marketplace workplace suite modules

2. TEAM COLLABORATION

- Can be deployed with in Microsoft Teams and O365 Group sites, access from Teams or SharePoint.
- Task Tracking in SharePoint (links to Outlook) or with Microsoft Planner
- Support discussions and forums with Yammer or Teams in the Product
- Team Calendar (links to Outlook)
- Document libraries in SharePoint, Teams or Onedrive
- Announcements
- Group OneNote

3. WORKORDERS

- Capture workorders multiple ways: End-user SharePoint portal, phone calls plus incoming email and external web form (requires optional add-on)
- Attach screen shots, documents etc.
- Role-based navigation and workorder forms
- Notifications (email) for workorder receipt, assignment and completion
- Link email correspondence to workorders
- Launch tasks directly from workorder form
- Launch change requests from workorder form
- View workorders via computer, tablet or smart phone
- Unlimited workorder list view including New Workorders, Overdue Workorders, Workorders by Type, Category, Priority and Status. Sort, filter and group as needed.
- Assign non-sharepoint staff and external contractors to workorders
- Cross-reference workorder data with Facilities and Assets, Change Management
- Hyperlink from open workorder to third party computer admin tools
- Quick Print workorder
- 2-way correspondence embedded in cases (optional)
- Create recurring Work Orders for Asset Maintenance and recurring jobs

4. END USER PORTAL

- Create a new case, and follow up on existing cases
- Knowledge Base
- Feedback/Surveys
- View Announcements
- Access Latest Documents and other relevant information
- Live support contact (requires Skype for Business/Lync)
- Permissions Driven
- Automatic Routing

5. CHANGE MANAGEMENT

- Track and manage any type of change requests
- Approval routing (single level) for sign-off
- Link Changes to cases and Facilities or Assets
- Launch tasks from change request form
- Track and audit change history
- Measure the impact of change on your facilities, assets, organization, resources and cost
- View, sort and filter change request information

6. KNOWLEDGE BASE

- Central point for Sharing information, knowledge and procedures
- Deploy for internal departmental use and for end-user self service
- Cross reference with cases and facilities or Assets
- New article approval available
- Track article changes with versioning

7. FACILITIES, ASSET TRACKING AND MANAGEMENT

- Track Assets in facilities
- Place to keep and track all Asset information including
  - Asset ID, Model, Serial number, Bar Code
  - Acquisition and disposal dates, cost information and vender info
  - Warranty and contract information
  - Deployment location, owner and department
  - Maintenance dates and logs
- Link Asset record to documents including manuals, contracts, warrantees etc.
- Cross reference with case tickets and change requests to track activity against the asset
- Insert hyperlinks to Vender Support sites
- Export information to Excel for reporting and inventory needs
- Import from Excel or Access to build initial Asset list
- View, sort and filter Asset list to find available assets, inventory by department
- View and track regular preventative maintenance

8. PREVENTATIVE MAINTENANCE AND RECURRING WORKORDERS

- Schedule for preventative maintenance for Assets
- Auto-generate Work Order Template for Maintenance tasks with check lists
- Track hours and costs against asset to analyze replacement vs maintaining
- Schedule recurring work jobs
- Auto-generate Work Order templates for scheduled work
- Assign staff or outside contractors
- Generate reports

9. TRACK CONTRACTORS, VENDORS, EQUIPMENT

- Track outside contractors, assign and send WO notifications. Rate work and link costs
- Manage and Track vendors, link assets and equipment, warranties etc.
- Track equipment checkout check in when doing work.

10. REPORTING / DASHBOARDS

- Built in reporting for tickets/cases/service requests tracking
- Quickly view departmental metrics on a single page
- View in Power BI for very powerful, dynamic analytics with graphical interfaces

11. INCLUDED TOOLS

- Dynamic Forms
  - Role based fields and tabs
  - Dynamic forms change based on selection
  - Powerful rule-based capabilities
  - Create Super Views with Virtual Lookups
- Web Parts

- o Promoted Links – Links backed by a SharePoint list, that filter and expire
- o Personnel Links – Display personalized links selected by the user
- o Announcements – Announcements that roll-up from departments
- o Organization News – a Governed alternative to SharePoint new with selected roll-up and approvals.
- Predefined Notifications using Power Automate (MS Flow)
  - o New item, assigned, overdue notifications
  - o Approvals for business forms
  - o Update list items or external databases, even active directory
  - o Create new sites and manage site permissions
  - o Leverage external application connectors for ERP, Accounting and other systems
- Leverage Office 365 communications features
  - o Click on a user (requester, assignee, approver etc.) to chat, talk and share screens
  - o Hold online meetings with end users or customers from the portal