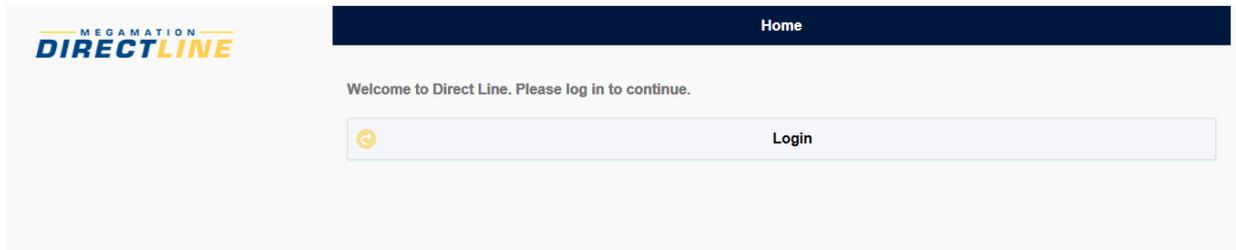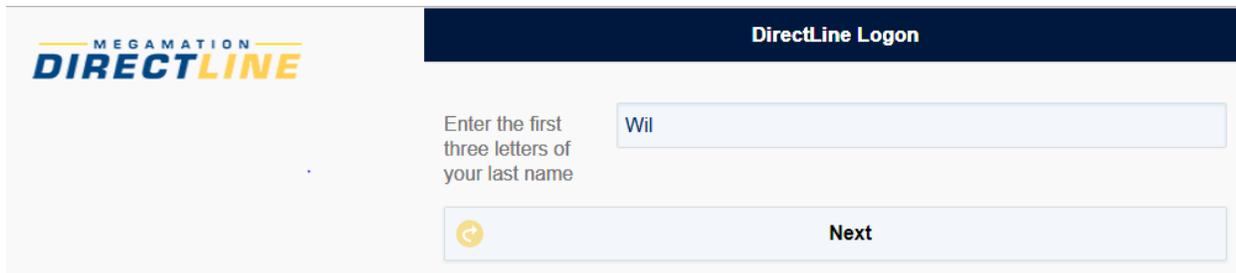# WORKORDER INSTRUCTIONS FOR SCHOOL

ENTERING A WORKORDER

1) Open Internet and go to www.sd27.bc.ca

2) Under "Staff Resources", click on "Maintenance Workorders". The following will open up.

3) Click on "Login"

4) Enter the first three letters of the Principal's last name. (Sample below)

5) Click "Next"

6) Principal's full name should appear. If there is more than one principal with the same last name, you will need to select the correct name using the yellow drop down arrow to the right of the name.
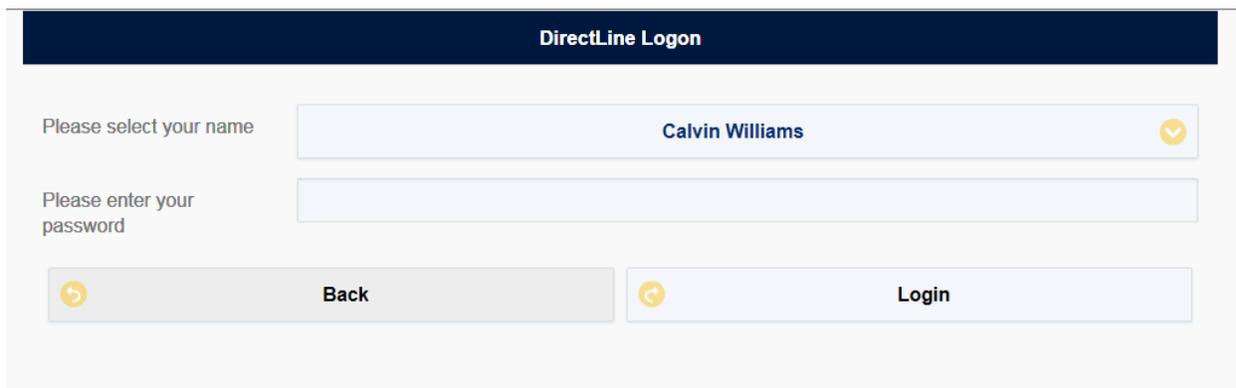
7) Enter your password

8) Click "Login".

9) You are now ready to enter a Workorder. Each field is explained below.

The fields with the asterisk ***** next to them are mandatory. Please note that if you would like to exit out of a screen without selecting from a drop down menu, click "Esc" on your keyboard.

Type: will default to "Repair".

> Other options are:
>
> - Capital Project (DO NOT USE - Maintenance Department Only)
> - Charge back to School
> - Emergency Repair
> - Occupational Health and Safety
> - Teacherage Repair
> - Vandalism

Assign to: Select the maintenance department from the drop down list.

Status: Defaults to Initiated.

Submitted by, Phone No and Email: Will automatically fill in from your login information.

Alt. Contact: If someone other than yourself is requesting a workorder, please put their name and phone number in so maintenance staff can contact them if they have questions.

Date: Will automatically fill in from your login information.

Site: Your school will fill in from your login. If you are a principal for more than one school location (ie Lake City Secondary) then you will have to choose the site.

View Site Map: (Before you select the map, ensure that your pop-up blocker is turned off on your computer otherwise the map will not open up)

This is a plan of your school site. You may want to print this plan and have it available when staff is notifying you of an issue so you can confirm which room/area the issue is in.

Select this map and a pdf will generate and be available on the <u>lower left corner of your screen</u>. Click on the pdf and the floor plan will open up showing all the rooms/areas of the school. Some schools will have more than one plan so please use the side scroll bar to navigate between. You are also able to zoom in and out on these plans by using the "+" or "-"signs on the lower right of the screen.

Each room, hallway etc. has a number associated with it. Please use this number when choosing the room/area below.

Building: Select a building from the drop down. (e.g. Main Building, Grounds, Exterior, etc.)

Room: Depending on your "Building" selection, you may have to select a room using the drop down arrow to the right. If you are not sure, click on the "View Site Map" button.

Work Description: Enter as much detail explaining the problem or request. The more details you can provide the maintenance staff the better.

Pictures: You have the option to attach a picture(s) to your workorder by checking the box. Note: if you selected this option, you will be able to upload pictures after you click "save" below. Then you can choose your file(s) and upload.

Save: Click. Workorder has been submitted. At this time you have the option to upload pictures.

Logout:

<u>SEARCHING FOR A WORKORDER</u>

1) Log in as per instructions 1-9 above.

2) Click on "Workorder Search" on the left menu. Screen looks like sample below.

3) At the top of the screen you have 2 tabs: "Criteria Search" or "Search by WO".

"Criteria Search" allows you to search a variety of ways for workorders on your school. Once you choose your criteria, click on "Search" and any workorder(s) associated will appear. Select "Back" if you would like to continue your search. Select "Clear" if you would like to clear all the criteria selected and start over.

All criteria fields are explained below:

> **Assign To:** Select the department(s) that you sent the workorder to by checking the box. Click "Done" then "Search".

> **Site:** Will automatically fill in with your login. However if you are a principal of a couple sites, you can choose your site by clicking on the yellow drop down arrow.

> **Building:** Select the site where the workorder was issued on. (ie: Main Building)

> **Status:** If you know the status of your workorder, select the appropriate box. This option is mainly used by the Maintenance Department.

> **Type:** Select the type of workorder you submitted. (ie: repair, vandalism, etc)

> **Issued To:** This option is used by the Maintenance Department only.

> **Submitted Date:** This option is used if you know approximately when the workorder was issued.

> **Submitted By:** Shows names that have submitted a workorder but not necessarily for your site. Suggest leaving this option blank unless you know you submitted the workorder.

Note: You do not need to choose any criteria and just hit the "Search" button at bottom. This will show all workorders for your school.

"Search by WO" allows you to search by the workorder number if you know it. Just type the number in the W/O# field and click "Go".

Hint: If you would like to see the full workorder from your queries, double click on the workorder and the workorder will open in a full screen. Once you are finished viewing you can click "Back" at top of screen.

Logout: