

PLAINFIELD PUBLIC SCHOOLS
DEPARTMENT OF FACILITIES & GROUNDS

**STANDARD OPERATING
PROCEDURES**



FOR PPS USERS

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WHAT IS FACILITRON?

Facilitron is a facility management software partnership for public and private facility operators such as schools, colleges, cities and churches designed to help them manage and track facility use, community facility use requests, maintenance tasks, building systems such as HVAC, register and document participants or the attendees at events.

In one place, Facilitron allows you to:

- View all of the activities occurring at any of your organization's facilities in a centralized calendar
- Internally schedule, reserve or request any of your organization's facilities
- Manage facility use requests that come in from the community or anyone outside the organization

WHAT DO I NEED TO KNOW?

Getting started with a new software platform can be intimidating, however learning the basics of Facilitron is easy. First, let's discuss some of the basic things you need to know to get you up and running.

UNDERSTAND THERE ARE TWO PARTS OF THE FACILITRON PLATFORM

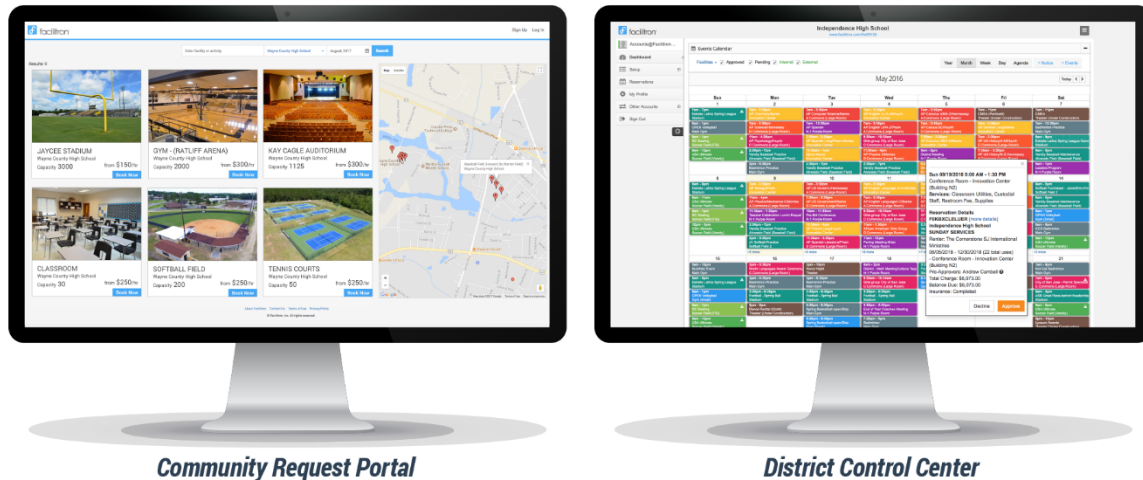
1. **The Community-Facing Front End** - the online rental site where the community goes to find available facilities, view photos, see pricing and configure requests
2. **The Administrative Back End** - where administrators go to manage community requests and where members of your organization go to make internal requests

Understanding who goes where, when is a simple, but fundamental basic of Facilitron. The community goes to the rental site on the front end, even if they have special rates or pay no fees. Facility administrators and internal users (such as teachers) who are requesting facilities go to the administrative back end. The back end will allow internal users to book or request facilities

and times that may not be available to the community (such as during the school day).

Platform has two parts

(Think: Front end and back end)

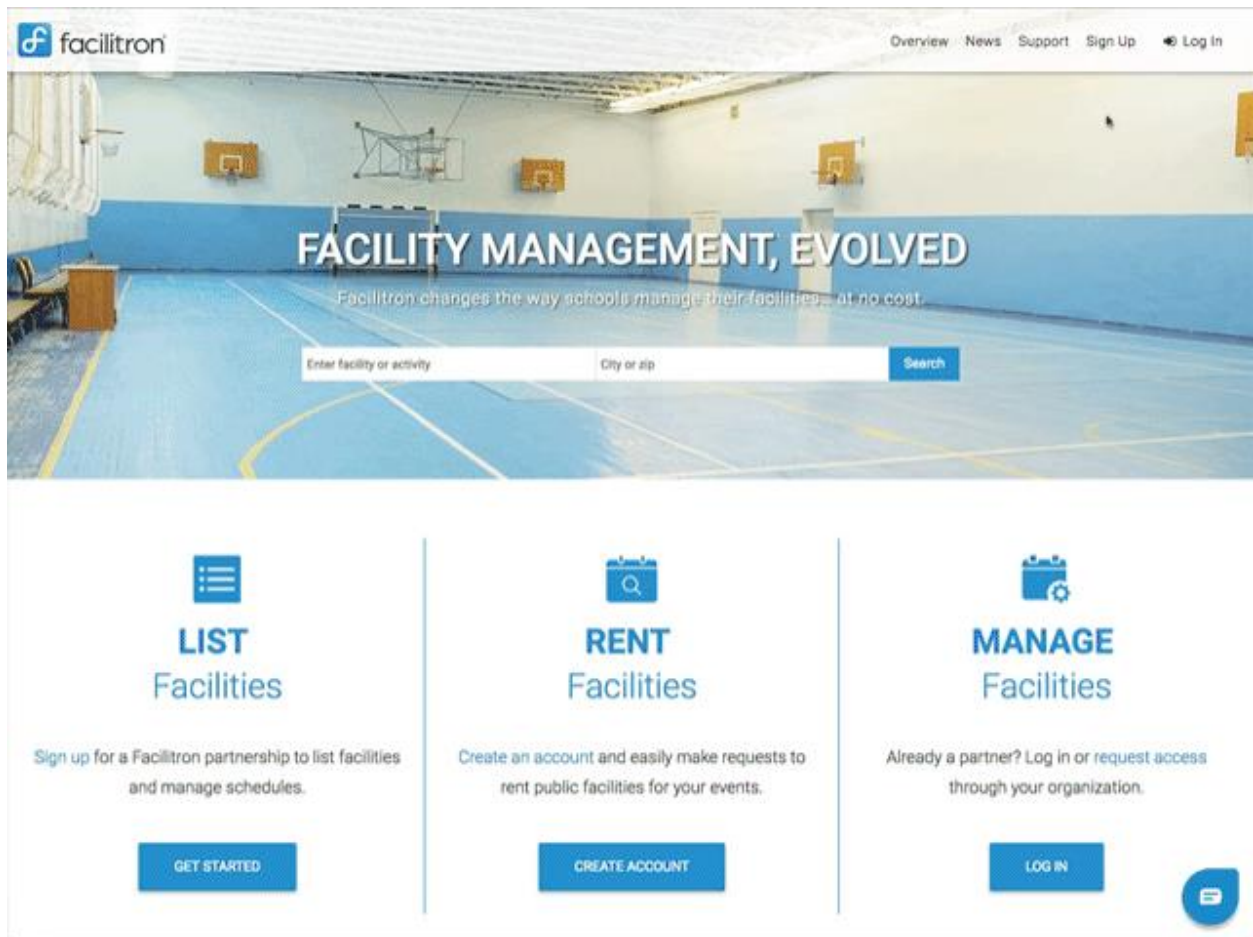


UNDERSTAND YOUR DISTRICT'S APPROVAL WORKFLOW

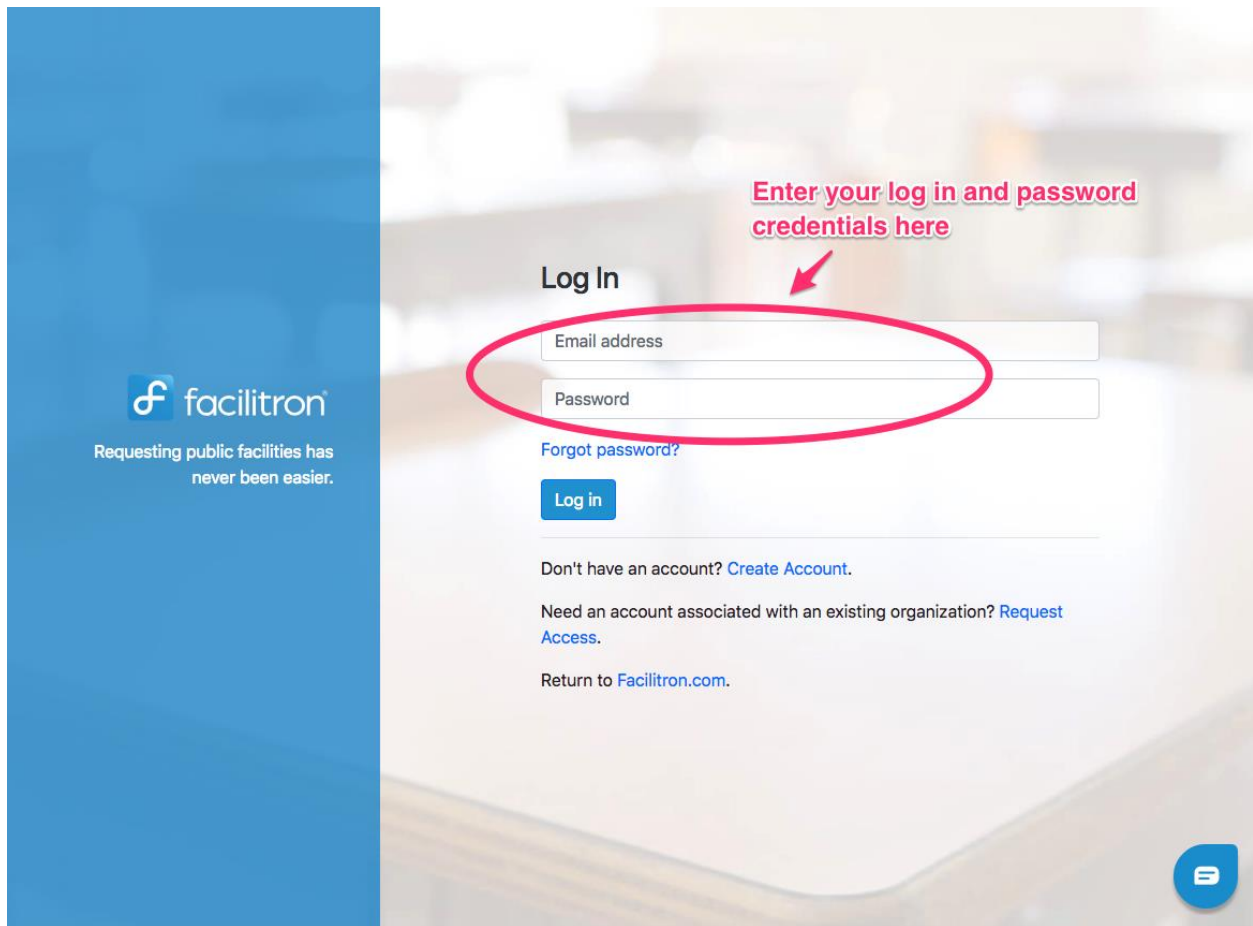
Accommodating quick approvals is one of the many benefits of the Facilitron platform. Your account has been set up to accommodate your organization's approval workflows per facility. It's important to understand who is the final approver and who are your organization's pre-approvers for certain facilities.

HOW TO LOG IN

To access your account, please select “Log in” in the top right-hand corner of this page.



You will be asked to enter your email address and password.



The image shows the Facilitron login page. On the left is a blue sidebar with the Facilitron logo and the text "Requesting public facilities has never been easier." The main content area has a blurred background of a hospital hallway. It features a "Log In" section with two input fields: "Email address" and "Password". A red oval highlights these fields, and a red arrow points to them with the text "Enter your log in and password credentials here". Below the fields is a "Forgot password?" link and a blue "Log in" button. At the bottom, there are links for "Create Account", "Request Access", and "Return to Facilitron.com". A small blue chat icon is in the bottom right corner.

Log In

Enter your log in and password credentials here

Email address

Password

[Forgot password?](#)

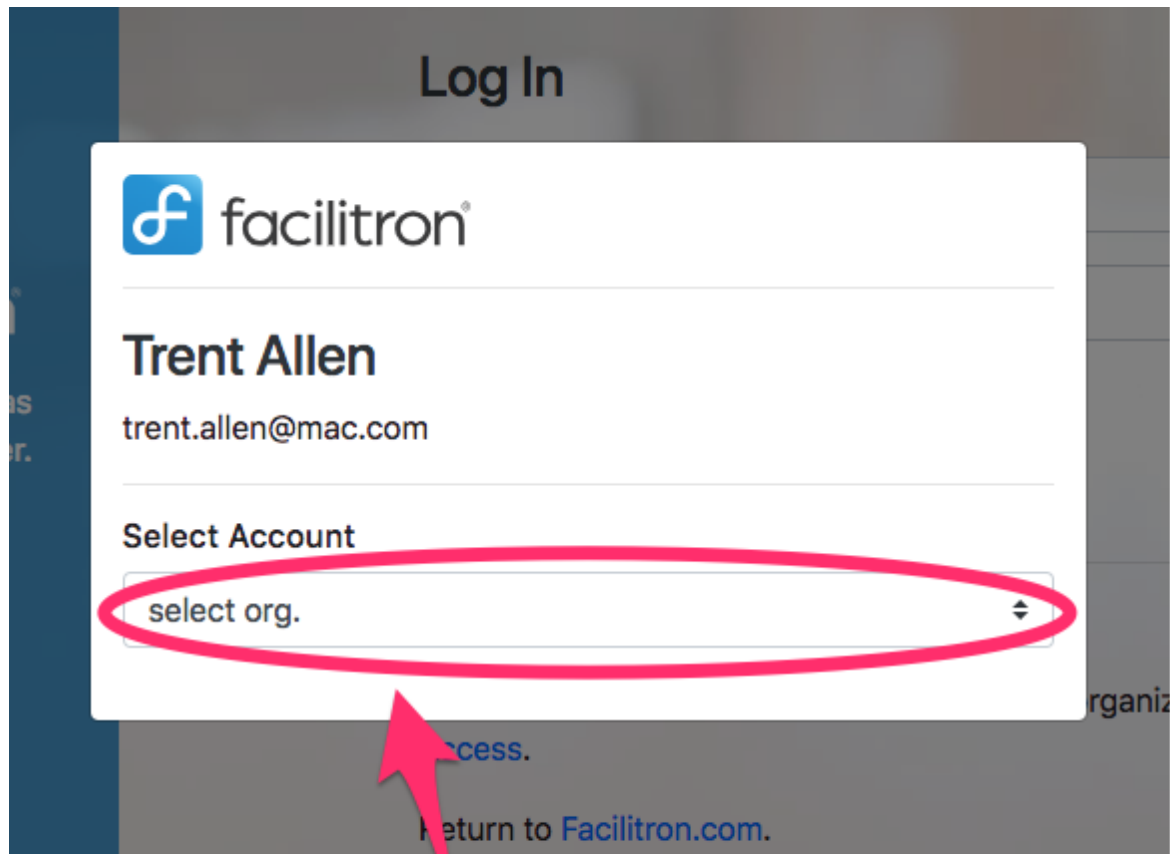
[Log in](#)

Don't have an account? [Create Account](#).

Need an account associated with an existing organization? [Request Access](#).

Return to [Facilitron.com](#).

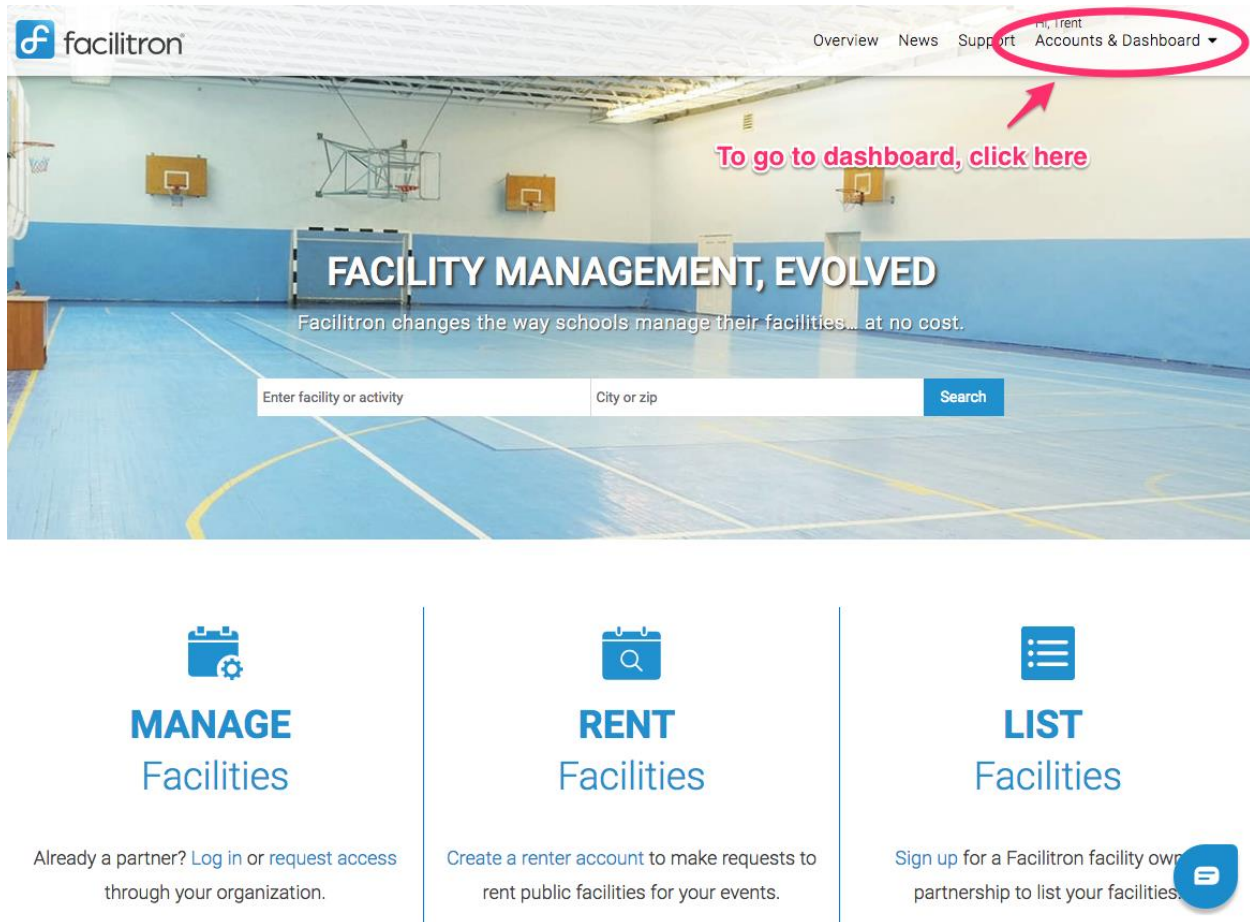
Once you have entered your information, please select your organization under Select Account.



The image shows a 'Log In' screen for Facilitron. A white login box is centered on a dark background. Inside the box, the Facilitron logo is at the top left. Below it, the name 'Trent Allen' and email 'trent.allen@mac.com' are displayed. Underneath is a 'Select Account' section with a dropdown menu. The dropdown menu is highlighted with a red oval and contains the text 'select org.' with a small downward arrow on the right. A red arrow points from the text below to the dropdown menu. The background of the login screen is dark grey with some faint text visible, including 'Log In', 'Facilitron', and 'Return to Facilitron.com'.

If you are logging on to manage an organization, you must choose the organization here.

You are now logged in. Depending on what type of account you have, you will either go to the Dashboard, or return to the Facilitron home page. If you return to the home page and want to go to the Dashboard, click on Accounts & Dashboard to reveal the Account pop up.

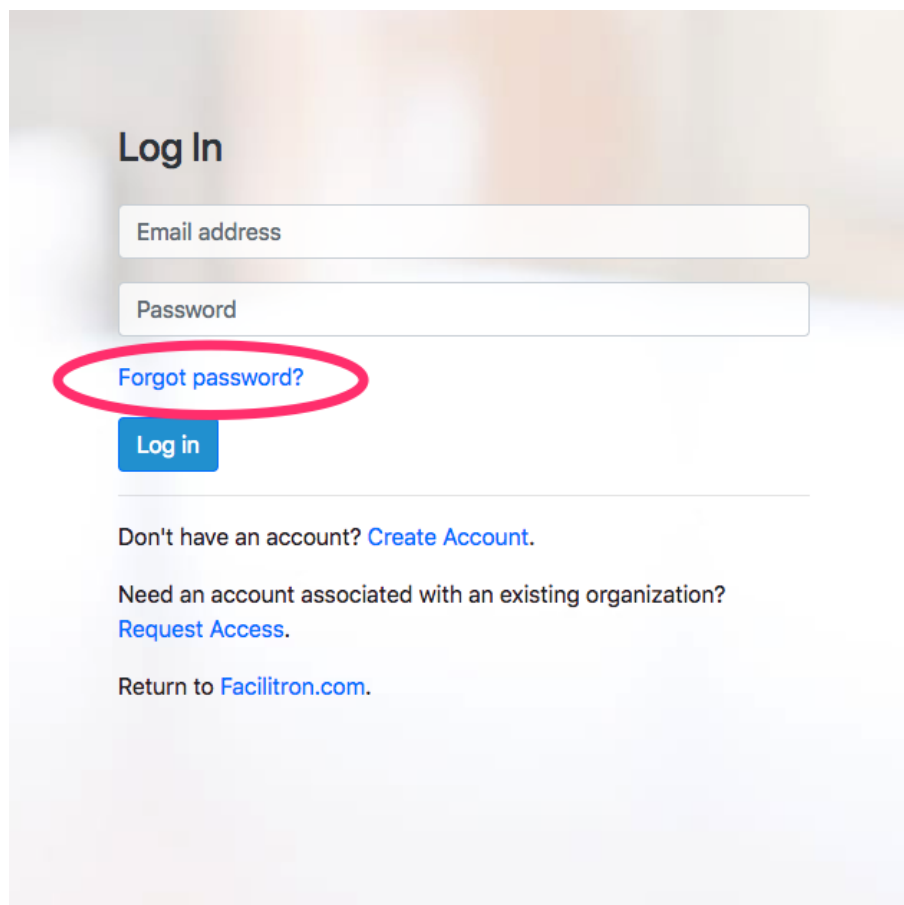


Click "Dashboard" to navigate to your dashboard.

FORGOT PASSWORD

Recovering a lost password

If you have created an account but are having trouble logging in, try resetting your password by selecting "Forgot Password" from the Log In window. Enter your email address and submit. If your email is registered with us, you will get an email reset password. You must follow the link in the email to create a new password.



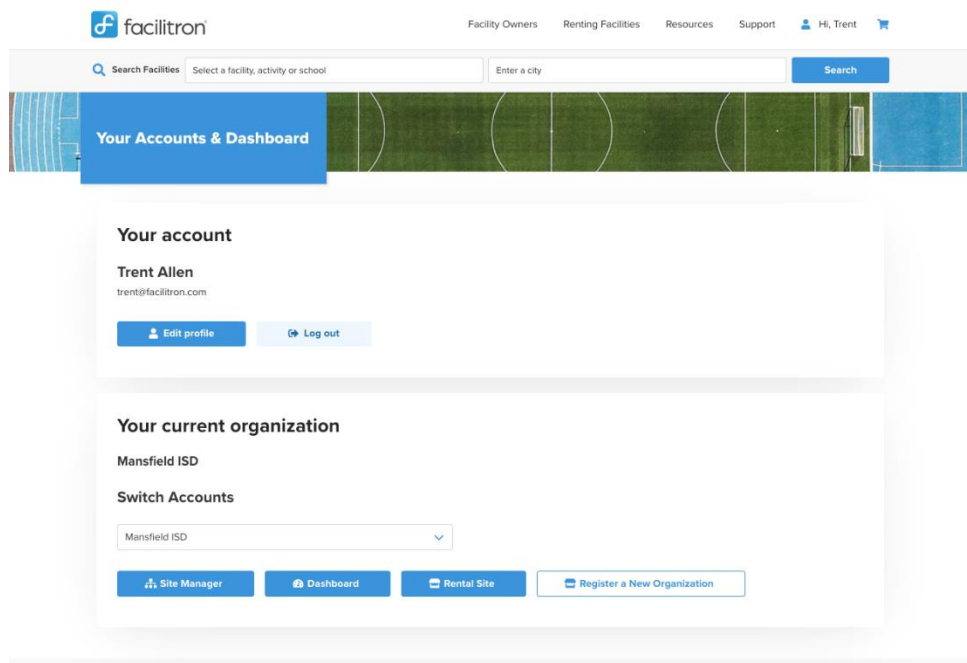
The screenshot shows a 'Log In' form with two input fields: 'Email address' and 'Password'. Below these fields is a link labeled 'Forgot password?' which is circled in red. Underneath the link is a blue 'Log in' button. At the bottom of the form, there are three links: 'Don't have an account? [Create Account.](#)', 'Need an account associated with an existing organization? [Request Access.](#)', and 'Return to [Facilitron.com.](#)'.

If you do not receive the email in your inbox, please check your spam or junk mailbox folders. (Note: You must use the email address that you signed up with in order to access your account).

If your email is not registered with us:

1. You haven't created an account yet
2. You are using a different email from the one you used to create your account
3. You are part of a Facility Owner organization (like a school district) and your account has not been created in the Facility Owner organization.

If you are part of a Facility Owner organization, your account must be set up and associated with the organization by Facilitron with approval from your organization.



TO CREATE AN INTERNAL RESERVATION

Creating schedules for internal activities and events is different from the way the community makes requests on the front end. You need to make sure you understand how to add an internal activity or event from your administrative back end (Hint: it's a lot like adding an event with Google calendar).

Internal events MAY go through an approval process depending on what you are requesting and what the privileges are with your role (*Example: requesting a conference room in the library for a teachers meeting may include the librarian in the approval workflow*)

Start by logging in and navigating to the Calendar on the Facilitron Dashboard and click on **+Event** in the right-hand corner

The screenshot shows the Facilitron web application interface. On the left, a sidebar contains navigation links: Dashboard, Calendar (highlighted with a red circle), Setup, Reports, Reservations, and Other Accounts. The main content area is titled 'NEWS Unified School District' and shows an 'Events Calendar' view for the week of Sep 9 to Oct 6, 2018. At the top right of the calendar view, there are buttons for '+ Notice' and '+ Event' (highlighted with a red circle and a pink arrow). The calendar grid shows various events scheduled across the days, such as 'Varsity Girls Soccer Practice' and 'Facilities Evaluation'.

Enter the information about your event and select the school site from the drop down to pick your facility.

Create Schedule

Faculty Meeting

Activity name (i.e.: class, lab, test, practice, game, etc.)

25spectators

Enter instruction and comments here...

Select facilities below or mark as ☐ Offsite Activity

Centennial High School (NEWS District)

Search facility

☒ Field

☐ General

☒ Library

☐ Gym

☐ Outdoor

☐ Multi-Purpose Room

☐ Room 03 - Classroom

☐ Room 02 - Classroom

☐ Room 01 - Classroom

☐ Room 05 - Classroom

☐ Room 04 - Classroom

09/13/2018

User/Renter: NEWS Unified Sc

8:00 AM9:00 AM

☐ Multiple Dates

Add to Schedule

Next select your date and time for your event.

Create Schedule

Faculty Meeting

Activity name (i.e.: class, lab, test, practice, game, etc.)

25

spectators

Enter instruction and comments here...

Select facilities below or mark as ☐ Offsite Activity

Centennial High School (NEWS District)

September 2018

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

☐ Multi-Purpose Room
☐ Room 05 - Classroom
☐ Room 04 - Classroom

09/13/2018

8:00 AM

9:00 AM

☐ Multiple Dates

User/Renter: NEWS Unified St

Add to Schedule

Finally, add your event to the schedule and click submit.

Create Schedule

Faculty Meeting

Activity name (i.e.: class, lab, test, practice, game, etc.)

25spectators

Enter instruction and comments here...

Select facilities below or mark as ☐ Offsite Activity

Centennial High School (NEWS District)

Search facility

☒ Field

☐ General

☐ Gym

☐ Outdoor

☐ Theater

09/13/2018

User/Renter: NEWS Unified Schc

8:00 AM

9:00 AM

Faculty Meeting

Library

09/13/2018 8:00 AM - 9:00 AM

X

☐ Multiple Dates

Add to Schedule

add another activity
or

Submit Schedule

INTERNAL SCHEDULES WITH MULTIPLE DATES

Creating an internal schedule with multiple dates allows you to build entire schedules into one reservation, such as athletic or class schedules. Start by going to your calendar on your dashboard and clicking + Event

The screenshot shows the Facilitron web application interface. On the left is a sidebar with a menu including 'Calendar', which is circled in red. The main content area is titled 'NEWS Unified School District' and shows an 'Events Calendar' for the week of Sep 9 - Oct 6, 2018. In the top right corner of the calendar interface, there are two buttons: '+ Notice' and '+ Event'. The '+ Event' button is circled in red, and a red arrow points to it from the right. The calendar grid below shows a weekly view with various activities listed for each day, such as 'Varsity Girls Soccer Practice' and 'Facilities Evaluation'.

Enter the schedule name and if applicable, your activity name (i.e. practice, game, conditioning, etc.) and select your school site and facility.

To add an activity to your schedule that does not recur on a constant schedule, enter the name of your activity and select the Pick My Dates section to select your own dates.

Create Schedule

Varsity Basketball Schedule

Home Games

Change your Activity Name

25

spectators

Please put down hoops

Select facilities below or mark as ☐ Offsite Activity

Centennial High School (NEWS District)

Search facility

☒ Field

☐ General

☐ Gym

☒ Gym

☐ Outdoor

☐ Theater

09/29/2018

User/Renter: NEWS Unified Schc

3:00 PM

5:00 PM

Varsity Basketball Schedule

Gym

Practice

09/17/2018 - 11/30/2018 3:00 PM - 5:00 PM

weekly , on: M W F

X

☒ Multiple Dates

☒ Weekly

~~Bi-weekly~~

Pick My Dates

on: 09/29/2018

Repeat On:

S

M

T

W

T

F

S

Submit Schedule

Add to Schedule

Here is the Practice schedule we added

add another activity or

« October 2018 »							Selected Dates	
Su	Mo	Tu	We	Th	Fr	Sa	09/29/2018	X
							10/13/2018	X
	1	2	3	4	5	6	10/17/2018	X
	7	8	9	10	11	12	10/26/2018	X
	14	15	16	17	18	19		
	21	22	23	24	25	26		
	28	29	30	31				

Cancel Submit

When you have selected all of your dates, click submit and add to schedule. You can continue to build your schedule by adding new activities to your event, adding additional times and dates, and even adding additional facilities needed.

Create Schedule

Varsity Basketball Schedule

Activity name (i.e.: class, lab, test, practice, game, etc.)

25spectators

Please put down hoops

Select facilities below or mark as ☐ Offsite Activity

Centennial High School (NEWS District)

Search facility

☒ Field

☐ General

☐ Gym

☒ Gym

☐ Outdoor

☐ Theater

09/17/2018User/Renter: NEWS Unified Schc

6:00 AM8:00 AM

☐ Multiple Dates

Add to Schedule

Varsity Basketball Schedule

Gym

Practice

09/17/2018 - 11/30/2018 3:00 PM - 5:00 PM

weekly , on: M W F

X

Conditioning

09/17/2018 - 09/17/2018 6:00 AM - 8:00 AM

weekly , on: M

X

Home Games

09/29/2018 - 10/26/2018 3:00 PM - 5:00 PM

custom

X

add another activity
or

Submit Schedule

Submit my complete
Varsity Basketball
Schedule

How do I Upload my Document? (Non-Profit Determination Letter, Team Roster, Tax Exemption Letter, etc).

*****This only applies to uploading the district's AV & Security Request Forms.*****

There are two ways to upload documents to your account: from the **Documents** page and from the **Reservation Details** page. We will go through each option below.

UPLOADING FROM THE DOCUMENTS PAGE

Begin by navigating to your Dashboard. On the left-hand menu, select Documents. Then select UPLOAD DOCUMENT.

A pop-up window will allow you to:

- Choose your File
- Enter your Document Name
- Select your Document Type from the drop-down menu
- Enter an Expiration Date

UPLOADING FROM THE RESERVATION DETAILS PAGE

You may also upload an insurance certificate to a specific reservation in the reservation details page. You can find the reservation on:

- the Dashboard
- the Calendar
- from a link in a Facilitron confirmation email
- or you may search for the reservation by using the reservation ID number:

The screenshot shows the Facilitron web application interface for a "Demo Renter Organization". The left-hand menu is visible, with the "Reservations" option highlighted. The main content area displays a search box and a table of reservations. A green arrow points to the search box, which contains the text "KA42WB9PMS3K7". Another green arrow points to the "Reservations" link in the left-hand menu. A green arrow also points to the "Reservation ID" column in the table, which contains the same text "KA42WB9PMS3K7". Below the table, a green arrow points to a link that says "Click Here to go to the Reservation Details Page".

Submit Date	Reservation ID	Event Name	Event Date	Facility	Status	Attendance	User Name	Total	Due
08/17/2021 2:13 pm	KA42WB9PMS3K7	Basketball Game	08/18/2021 - 08/18/2021	Northside High School (DEMO) (TESTING PURPOSES ONLY) Gym - Large	Pending	0	Kristina Kirkland	\$601.20	\$601.20

Once you've found your reservation, click on the Reservation ID to open the Reservation Details Page. Click into Documents and choose "Attach Document" to upload your document.

The screenshot shows the Facilitron web application interface for a 'Demo Renter Organization'. The main content area displays reservation details for a 'Basketball Game' on 08/18/2021. A green box highlights the 'Documents' section, which shows 'Facilitron' as the document type and 'Completed' as the status. Below this, the 'Attach Document' button is visible. The interface also includes a sidebar with navigation options like Dashboard, Calendar, Payments, Documents, Insurance, Setup, Reservations, Support, and Other Accounts. The top right shows the organization name and a help icon.

Note: If the Attach Document button is not showing, click on the word "Documents" to open the drop down.

- A pop-up window will allow you to:
- Browse for your File
- Enter your Document Name
- Enter an Expiration Date
- Select your Document Type from the drop down menu
- Select the Organization (or District) to apply the document
- Then Upload to complete

The screenshot shows the 'Attach Document' pop-up window. It includes a 'Browse...' button, a 'No file selected.' message, and input fields for 'Document Name', 'Expiration Date', 'Document Type', and 'Applies to'. The 'Document Type' is set to 'Select Doc. Type' and 'Applies to' is set to 'Applies to'. The 'Upload' button is highlighted in orange.

HOW TO CREATE INTERNAL SCHEDULES OR MAKE INTERNAL REQUESTS

Creating schedules for internal activities and events is different from the way the community makes requests on the front end. You need to make sure you understand how to add an internal activity or event from your administrative back end (Hint: it's a lot like adding an event with Google calendar).

Internal events MAY go through an approval process depending on what you are requesting and what the privileges are with your role (*Example: requesting a conference room in the library for a teachers meeting may include the librarian in the approval workflow*)

Events Calendar View Details Sunday

Organizations (16) Facility Type (33) Services Status (A, P) Type (I, E)

Year 4 Weeks Calendar + Notice + Event

Dec 30, 2018 — Jan 26, 2019 Today < >

Click "+Event" to create an internal schedule

Sun 30	Mon 31	Tue 1	Wed 2	Thu 3	Fri 4	Sat 5
6am - 11:55pm Not Available on Sundays Santa Teresa High School Field - Football Stadium	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Main	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Main	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Main	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Main	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Main	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Main
6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Main	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Football Stadium	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Football Stadium	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Football Stadium	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Football Stadium	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Football Stadium	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Football Stadium
6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Football Stadium	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Diving	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Diving	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Diving	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Diving	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Diving	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Diving
6am - 11:55pm School Closed/ Vacation Santa Teresa High School Pool - Diving	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (JV - North)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (JV - North)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (JV - North)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (JV - North)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (JV - North)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (JV - North)
6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (JV - North)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (Varsity - S)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (Varsity - S)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (Varsity - S)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (Varsity - S)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (Varsity - S)	6am - 11:55pm School Closed/ Vacation Santa Teresa High School Field - Softball (Varsity - S)
+25 more	+30 more	+33 more	+43 more	+47 more	+51 more	+38 more

The Create Schedule model popup:

Create Schedule

✕

schedule name

Activity name (i.e.: class, lab, test, practice, game, etc.)

participants

spectators

Enter instruction and comments here...

Select facilities below or mark as ☐ Offsite Activity

NEWS Unified School District

Search facility

☐ General

☒ Theater

01/02/2019

User/Renter: NEWS Unified Sr

8:00 AM

9:00 AM

☐ Multiple Dates

Add to Schedule

WHEN WILL MY REQUEST BE APPROVED?

Facilitron does not approve requests and cannot control the timeline for a district to approve a request. However, we work with districts to address outstanding or pending requests on a regular basis to encourage and assist the process.

CAN I CANCEL MY RESERVATION?

Facilitron allows renters to request to **cancel** or **suspend** a reservation. Any cancel or suspend request is first subject to the policies of the specific public space owner organization (such as a school district) where the reservation was placed.

Canceling a reservation *loses priority status* and *requires a new application* to reinstate. Suspending a reservation allows it to be reinstated when availability is reopened.

CANCELLING A REQUEST BEFORE APPROVAL

Renters may cancel a request at any time before it is approved. To cancel, navigate to the reservation detail page (See the support document, "[Using The Dashboard](#)") and click "Cancel Reservation"

The screenshot shows the Facilitron interface for a Demo Renter Organization. The reservation is for a Flag Football event on 11/10/2018, with a status of PENDING. The reservation details include a service fee of \$29.40, a daily total of \$490.00, and a total of \$519.40. A cancellation policy is listed, stating that cancellations must be made five business days or more in advance. The reservation is for a Field - Football event, scheduled for Saturday, 11/10/2018, from 4:00 PM to 6:00 PM. The reservation timeslots show a daily total of \$490.00. The payment section shows a total fee of \$519.40 and a payment due of \$519.40. The 'Cancel Reservation' button is highlighted with a red circle.

CANCELLING AN APPROVED REQUEST

After a reservation request is approved, it can only be cancelled with the Facility Owner Organization approval and subject to that organization's cancellation policy. You may however, request cancellation.

To request a cancellation of an approved reservation, go to the reservation and click "Request Cancellation." The Facility Owner Organization will be notified.

The screenshot shows the Facilitron web application interface for a 'Demo Renter Organization'. The left sidebar contains navigation links: Dashboard, Calendar, Payments, Insurance, Setup, Reservations, Other Accounts, and Sign Out. The main content area displays reservation details for '08/17/2018 - OZRC67149L12', which is in 'APPROVED' status. A red box highlights the 'Cancellation Policy' section, which states: 'Cancellations must be made five (5) business days or more in advance of the cancelled date in order to receive a refund.' Below this, a red arrow points to the 'Request Cancellation' button, with the text 'To request cancellation of an approved event, click here' overlaid in red. The interface also shows a 'Calendar' section with a 'Schedule' link and 'Reservation Timeslots' for two dates: Saturday 09/01/2018 and Saturday 09/08/2018, both for a 'Multi-Purpose Room' from 12:00 PM to 3:00 PM, with a daily total of \$90.00.

You may make any comment in the dialog box before submitting.

The screenshot shows a 'Cancel Reservation' dialog box. The text inside the dialog reads: 'This will send a request to cancel your Approved reservation. Are you sure you wish to cancel?' followed by a note: 'Note: Depending on the facility rental policy and terms, cancellation fees may apply.' Below the text is a text input field containing the text 'request cancel please.' with a mouse cursor pointing at it. At the bottom right of the dialog are two buttons: 'Close' and 'Submit'.

FACILITRON ACCESS FOR STAFF/EMPLOYEES

Only School Administrators or Facilitron Customer Support can add school staff to your school or district organization. Staff access must be setup internally, associated with your school and assigned a role to gain access to school calendars and the scheduling system.

To request access, contact your school or district administrator and request to be added to the system.

Need additional support? Please visit www.facilitron.com, "Renter Support" page for more videos & tutorials on Facilitron.

Should you require additional support, please email
facilityusage@plainfield.k12.nj.us.