

Facilities Work Request Instructions

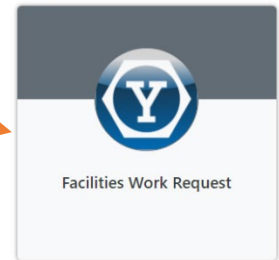
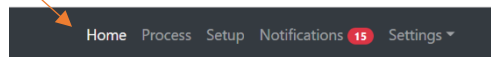
Yale's facilities work request form (FWR), available on the Facilities website **homepage**, is used to submit all service request needs for Facilities Services. All your requests can be found by selecting the **[Process]** tab after you have completed the form and submitted a request. This guide will walk you through the request and review process.

Submitting a Request



1. After selecting **[Submit a Request]** from the Facilities website homepage, authenticate using your SSO credentials.

2. To submit a service request, select the form through an image labeled **[Facilities Work Request]**. (If you do not see the image, select the **[Home]** menu button at the top of the page).



Yale
Facilities Work Request

(* = Required)

Emergency? Call the Facility Operations Center (203) 432-6888.

Location *

Work Type *

Description *

Priority on phase
 URGENT
 ROUTINE

Phone (submitted by)
Please provide a contact number.

Would you like to add an alternate requestor?
 Yes
 No

Billing preset to map

3. On the form, starting with **[Location]**, select inside the box and begin typing the official property name or FAC-ID (ability to search by building alias/name or address not available).

Location *

[type building name here to filter the list]

(Select One)

- A.K. WATSON HALL (1530)
- ADAMS CENTER (1946)
- AIR RIGHTS GARAGE (2966)
- ALLUVIA BLDG (2708)
- ALLWIN HALL (1125)

4. After selecting a location, the field to select a floor will reveal itself if applicable. In this case, select a **[Floor]**.

Floor

002

5. Next, select the **[Room]** number.

Room

(259) SEMINAR ROOM 2

6. Select from the [Work Type] drop-down menu and pick a topic that most closely identifies the work you are requesting: Electrical – Lighting & Power, Custodial Service, etc.

Work Type *

Electrical - Lighting & Power

7. Enter a description of work needed and other relevant details for the request.

Description *

There are 2 lights out in the office space.

8. If your request requires customer funding, select the checkbox for [Customer] and an additional set of Chart of Account (COA) fields will appear. If this is unknown, do not check the box and continue to step number 11.

Customer Funded (Department COA)

Customer

Customer Funded work category

DEPARTMENT FUNDED

Estimate Y/N

No Estimate

Company

Example: CO01

Yale Designated / Gift

Example: YDxxxxxx

Cost Center

Example: CCxxxx

Program

Example: PGxxxxxx

Project

Example: PJxxxxxx

Assignee

Example: ACGxx

First, select the appropriate category for the request.

9. If a work estimate is required, select [Estimate] from the drop-down menu.

10. Lastly, enter the COA details starting with [Company]. All COA fields are required **except** [Assignee].

11. Next, select the appropriate priority.

Priority on phase

URGENT

ROUTINE

12. Enter or verify the best contact phone number.

Phone (submitted by)

Please provide a contact number.

13. If you would like to have other individuals receive email notifications for this request, select the [Yes] radio button under “Would you like to add an alternate requestor?” A total of three additional requestors can be added.

Would you like to add an alternate requestor?

Yes

No

14. Enter either a [NetID] or begin typing the person's last name. Select the appropriate individual. The additional contact information will auto populate and a prompt to add another alternate will be available.

Note: If you selected the wrong individual, you must clear out the values for that person and then enter the correct NetID or last name.

NetID
(KM2523) MARKARIAN, KRISTEN

Name
KRISTEN MARKARIAN

Phone
Alternate Contact Phone

Email
kristen.markarian@yale.edu

Another alternate requestor?
 Yes
 No

Note: The Facility ID is for administrative use only.

15. There is a drop zone for attachments here, on the next page and within the [Process] tab. Upload any relevant images and documents that will be useful to the work being requested. Do not click the review button until after adding your attachments.

Facility ID for chosen property
CEN

Cancel Review

Drop Files To Attach Or:
Browse

16. Select the [Review] button.

(* = Required)

Location *
1530 - A.K. WATSON HALL

Floor
001 - 1ST FLOOR

Room
101 - FACULTY OFFICE

Work Type *
Electrical - Lighting & Power

Description *
There are two lights out in the office area.

Customer Funded (Department CDA)

Priority on phase
ROUTINE

Phone (submitted by)
203 555 5555

Would you like to add an alternate requestor?
No

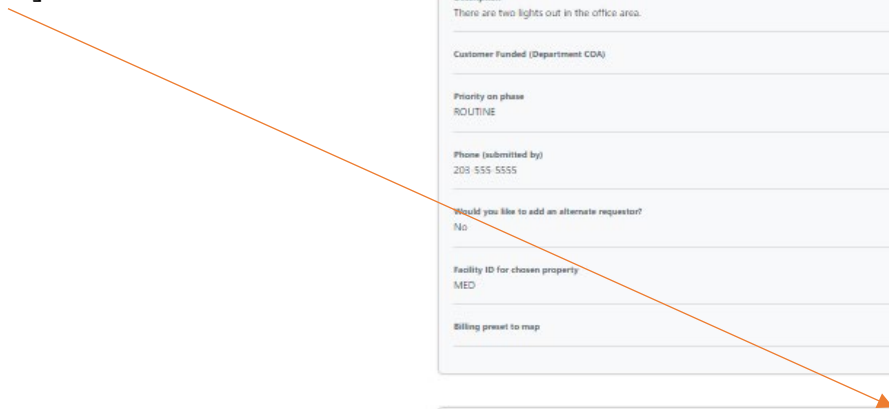
Facility ID for chosen property
MED

Billing preset to map

Drop Files To Attach Or:

17. On the final form page, review all the details for your request. If changes are required, select the [Previous] button and modify your answers before submission.

18. Select [Submit].



Reviewing a Request

1. After selecting [Submit], you will be brought back to the homepage. Select [Process] in the top menu bar.

The screenshot shows the top navigation bar with the following items: Home, Process (highlighted with an orange arrow), Setup, Notifications (with a red circle containing '0'), and Settings (with a dropdown arrow). To the right of the navigation bar is a search box labeled 'Processes'. Below the navigation bar is a table with the following structure:

Category	Count	Filter	Action
Awaiting Your Review	4	Filter Awaiting Your Review	Clear
Yesterday			
Your Open Requests	7	CEN - A.K. WATSON HALL - 2...	1009 Kristen Markarian 06/09/2022
Your Watch List		CEN - A.K. WATSON HALL - P...	1007 bv6jPzqRMLBgY... 06/09/2022
Your Closed Requests		CEN - A.K. WATSON HALL - C...	1006 bv6jPzqRMLBgY... 06/09/2022
All Requests		CEN - A.K. WATSON HALL - C...	1003 bv6jPzqRMLBgY... 06/09/2022

2. Any requests you submit, regardless of status, will be found in the menu item called [All Requests].
3. The most recent requests will be sorted at the top. Select a specific request to view the details.

The screenshot shows the top navigation bar with the following items: Home, Process, Setup, Notifications (with a red circle containing '0'), and Settings (with a dropdown arrow). To the right of the navigation bar is a search box labeled 'Processes'. Below the navigation bar is a table with the following structure:

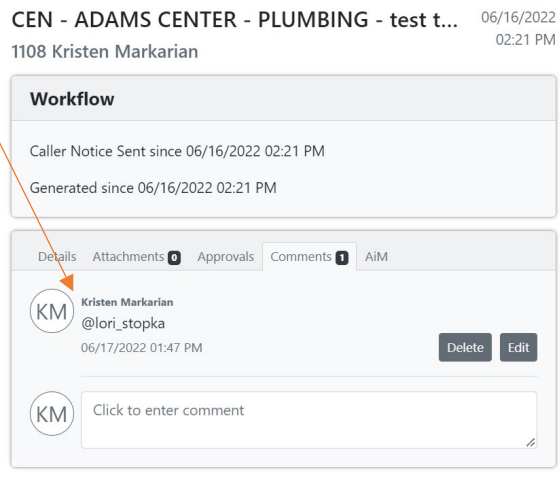
Category	Count	Filter	Action
Awaiting Your Review	4	Filter All Requests	Clear
Today			
Your Open Requests	8	CEN - A.K. WATSON HALL - 1...	1010 ReADY User 06/10/2022
Your Watch List		Yesterday	
Your Closed Requests		CEN - A.K. WATSON HALL - 2...	1009 Kristen Markarian 06/09/2022
All Requests		CEN - A.K. WATSON HALL - P...	1008 bv6jPzqRMLBgY... 06/09/2022
		CEN - A.K. WATSON HALL - P...	1007 bv6jPzqRMLBgY... 06/09/2022
		CEN - A.K. WATSON HALL - C...	1006 bv6jPzqRMLBgY... 06/09/2022
		CEN - A.K. WATSON HALL - E...	1005 Barbara Haberman 06/09/2022
		CEN - A.K. WATSON HALL - C...	1004 bv6jPzqRMLBgY... 06/09/2022

The detailed view of the selected request shows the following information:

- Title:** CEN - A.K. WATSON HALL - 101 ELECTRICAL ...
- User:** 1010 ReADY User
- Date:** 06/10/2022 08:48 AM
- Workflow:** Generated since 06/10/2022 08:53 AM
- Work Type *:** Electrical - Lighting & Power
- Description *:** There are lights out.
- Building Info::** 1530 A.K. WATSON HALL 101

Adding an Additional Requestor Post Submission

1. In addition to adding customer comments for Facilities Operations to review in the [Comments] tab, you can also add additional requestors (watchers) to your request notifications. To do so, you can simply assign the person(s) by applying [@firstname_lastname] in the comments section. These additional individuals will receive the same email communications with work order updates.



The screenshot displays a work order interface for 'CEN - ADAMS CENTER - PLUMBING - test t...'. The header shows the date '06/16/2022' and time '02:21 PM', along with the user '1108 Kristen Markarian'. Below the header is a 'Workflow' section with the following text: 'Caller Notice Sent since 06/16/2022 02:21 PM' and 'Generated since 06/16/2022 02:21 PM'. The main content area has tabs for 'Details', 'Attachments 0', 'Approvals', 'Comments 1', and 'AIM'. The 'Comments' tab is active, showing a comment by 'Kristen Markarian' with the handle '@lori_stopka' and a timestamp of '06/17/2022 01:47 PM'. The comment text is 'Click to enter comment'. There are 'Delete' and 'Edit' buttons next to the comment. An orange arrow points from the text in the first list item to the 'Comments' tab and the comment itself.