

Facilities Work Request Instructions

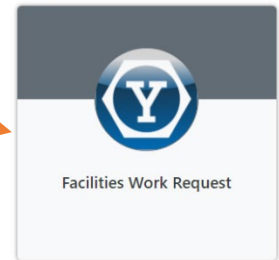
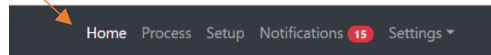
Yale's facilities work request form (FWR), available from the Facilities **Home** page, is used to submit all service request needs for Facilities Services. All your requests can be found by selecting the **[Process]** tab after you have completed the form and submitted a request. This guide will walk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

Submitting a Request



1. After selecting [submit a request] from the Facilities website home page, 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 the 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

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

Work Type *

Electrical - Lighting & Power

Description *

There are 2 lights out in the office space.

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.

- If a work estimate is required, select [Estimate] from the drop-down menu.
- Lastly, enter the COA details starting with Company. All COA fields are required EXCEPT Assignee.

- Next, select the appropriate priority.

Priority on phase

URGENT

ROUTINE

- Enter or verify the best contact phone number.

Phone (submitted by)

Please provide a contact number.

- If you would like to have other individuals receive email notifications about 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: Facility ID is for administrative use only.

15. There is a drop zone for attachments here, on the next page and in 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 attachments.

Facility ID for chosen property
CEN

Cancel Review

Drop Files To Attach Or:
Browse

16. Select the Review Button.

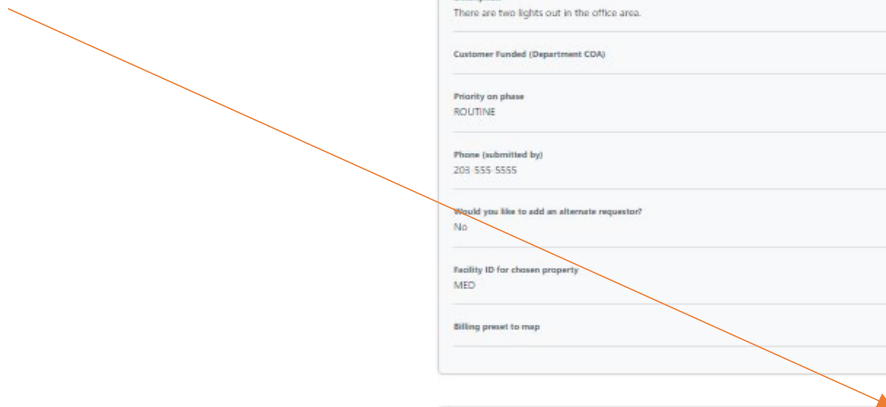
(* = Required)

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 home page. Select [Process] in the top menu bar.

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 sidebar menu with the following items: Awaiting Your Review (with a red circle containing '4'), Your Open Requests (with a red circle containing '7'), Your Watch List, Your Closed Requests, and All Requests. An orange arrow points to the 'Process' menu item in the top bar. Another orange arrow points to the 'All Requests' menu item in the sidebar.

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 software interface with the 'All Requests' menu item selected in the sidebar. An orange arrow points to the 'All Requests' menu item. The main content area displays a list of requests, with the most recent one selected. The selected request is 'CEN - A.K. WATSON HALL - 101 ELECTRICAL ...' by '1010 ReADY User' on '06/10/2022'. The details for this request are shown on the right, including the workflow, work type, description, and building info.

Request ID	Request Title	User	Date
1010	CEN - A.K. WATSON HALL - 101 ELECTRICAL ...	ReADY User	06/10/2022
1009	CEN - A.K. WATSON HALL - 2...	Kristen Markarian	06/09/2022
1008	CEN - A.K. WATSON HALL - P...	bv6jPzqRMLBgY...	06/09/2022
1007	CEN - A.K. WATSON HALL - P...	bv6jPzqRMLBgY...	06/09/2022
1006	CEN - A.K. WATSON HALL - C...	bv6jPzqRMLBgY...	06/09/2022
1005	CEN - A.K. WATSON HALL - E...	Barbara Haberman	06/09/2022
1004	CEN - A.K. WATSON HALL - C...	bv6jPzqRMLBgY...	06/09/2022

Workflow
Generated since 06/10/2022 08:53 AM

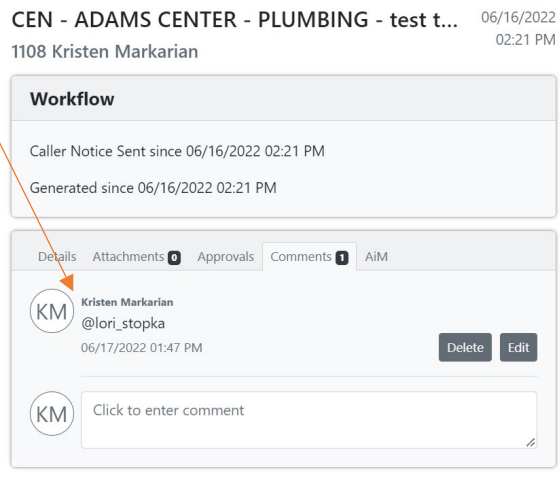
Work Type *
Electrical - Lighting & Power

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 on 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 this is a 'Workflow' section with the 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 the timestamp '06/17/2022 01:47 PM'. There are 'Delete' and 'Edit' buttons next to the comment. Below the comment is a text input field with a placeholder 'Click to enter comment' and a circular profile picture icon with the initials 'KM'. An orange arrow points from the text in the first list item to the 'Comments' tab and the user's profile picture in the screenshot.