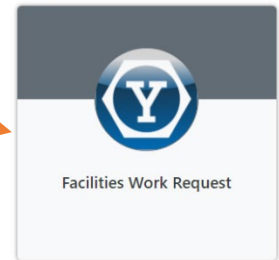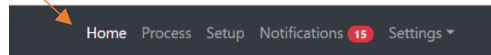# Facilities Work Request Instructions

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).

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).

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

5. Next, select the room number.

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 ▾

Description *
There are 2 lights out in the office space.

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

Customer Funded (Department COA)
☑ Customer

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.

   First, select the appropriate category for the request.

Customer Funded work category
DEPARTMENT FUNDED ▾

Estimate Y/N
No Estimate ▾

Company
Example: CO01

Yale Designated / Gift
Example:YDxxxxxx

Cost Center
Example: CCxxxx

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

Program
Example: PGxxxxx

10. Lastly, enter the COA details starting with Company. All COA fields are required EXCEPT Assignee.

Project
Example: PJxxxxxx

Assignee
Example: ACGxx

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 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.

Facility ID for chosen property

CEN

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.

Cancel   Review

Drop Files To Attach Or:

Browse

16. Select the Review Button.

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.

CEN - A.K. WATSON HALL - 101 ELECTRICAL - There are ...

(* = 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 COA)

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

[Cancel]   [◄ Previous] [Submit]

Drop Files To Attach Or:
[Browse]

Reviewing a Request

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

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.

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.