

# 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.

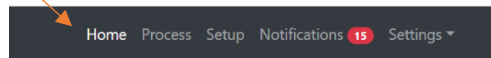
## Submitting a Request



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

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 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)

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.

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

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.

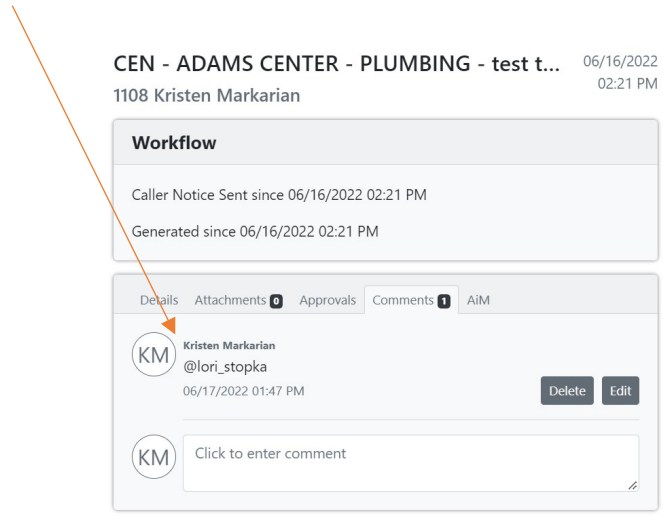
The screenshot shows the top navigation bar with links for Home, Process, Setup, Notifications (with a red notification icon), and Settings. A search bar on the right contains the text 'Processes'. Below the navigation bar is a sidebar menu with the following items: 'Awaiting Your Review' (4), 'Your Open Requests' (7), 'Your Watch List', 'Your Closed Requests', and 'All Requests'. The main content area shows a table of requests under the 'Yesterday' filter. The first row is: 'CEN - A.K. WATSON HALL - 2...' with ID '1009' and user 'Kristen Markarian' on '06/09/2022'. The second row is: 'CEN - A.K. WATSON HALL - P...' with ID '1007' and user 'bv6jPzqRMLBgY...' on '06/09/2022'. The third row is: 'CEN - A.K. WATSON HALL - C...' with ID '1006' and user 'bv6jPzqRMLBgY...' on '06/09/2022'. The fourth row is: 'CEN - A.K. WATSON HALL - C...' with ID '1003' and user 'bv6jPzqRMLBgY...' on '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 'All Requests' menu item selected in the sidebar. The main content area shows a table of requests under the 'Today' filter. The first row is: 'CEN - A.K. WATSON HALL - 1...' with ID '1010' and user 'ReADY User' on '06/10/2022'. This request is selected, and its details are displayed on the right. The details include: 'Workflow' (Generated since 06/10/2022 08:53 AM), 'Work Type \*' (Electrical - Lighting & Power), 'Description \*' (There are lights out.), and 'Building Info::' (1530 A.K. WATSON HALL 101). The sidebar menu also shows 'Awaiting Your Review' (4), 'Your Open Requests' (8), 'Your Watch List', 'Your Closed Requests', and 'All Requests'.

## 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 request notification for "CEN - ADAMS CENTER - PLUMBING - test t...". The notification includes the following information:

- Title: CEN - ADAMS CENTER - PLUMBING - test t...
- Date: 06/16/2022
- Requester: 1108 Kristen Markarian
- Time: 02:21 PM

The interface is divided into two main sections:

- Workflow:**
  - Caller Notice Sent since 06/16/2022 02:21 PM
  - Generated since 06/16/2022 02:21 PM
- Comments:**
  - Navigation tabs: Details, Attachments (0), Approvals, Comments (1), AiM
  - Comment by Kristen Markarian (@lori\_stopka) on 06/17/2022 01:47 PM. The comment text is "Click to enter comment".
  - Buttons: Delete, Edit

An orange arrow points from the text in the first list item to the "Details" tab in the Comments section of the screenshot.