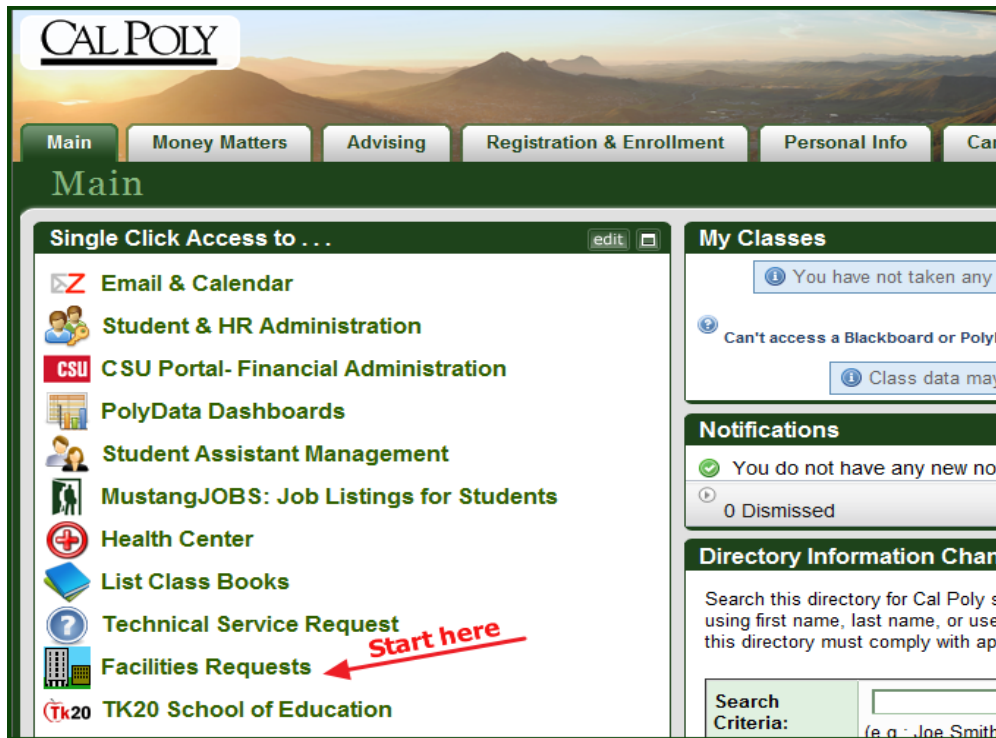
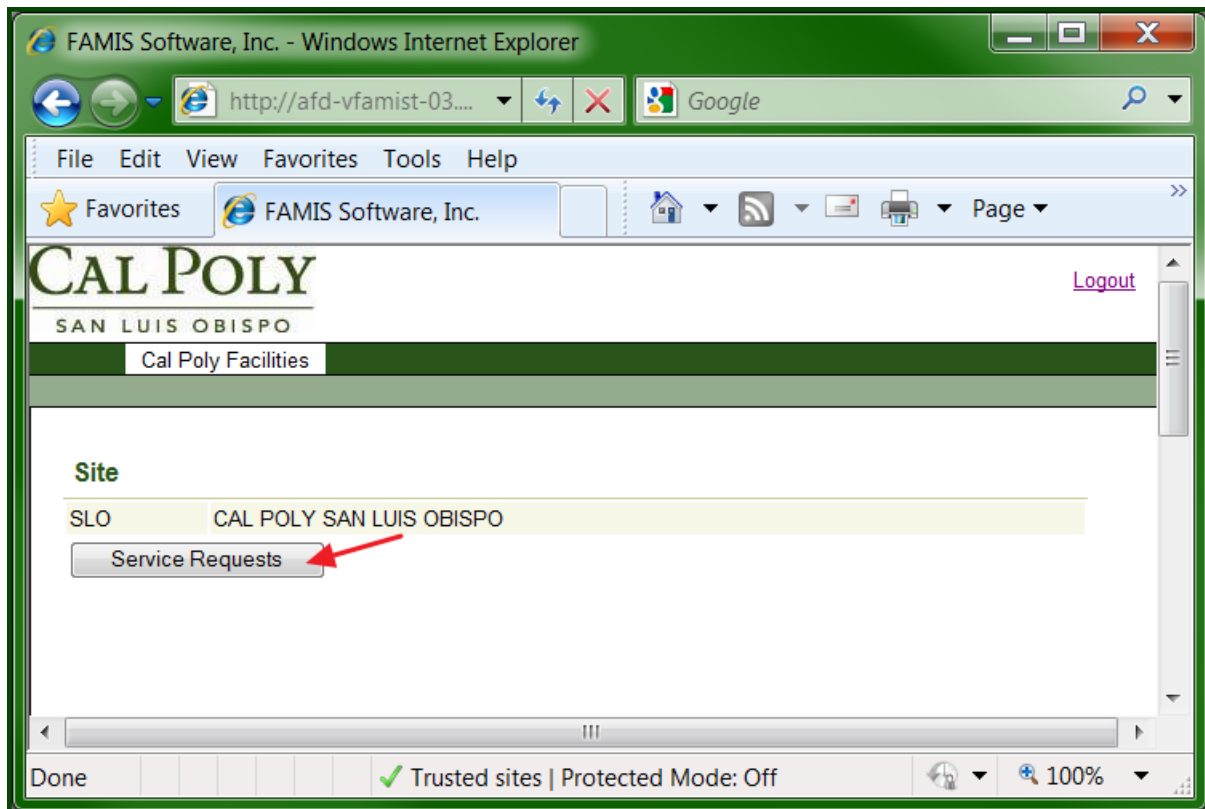


## How to use Facilities Self Service to enter Service Requests

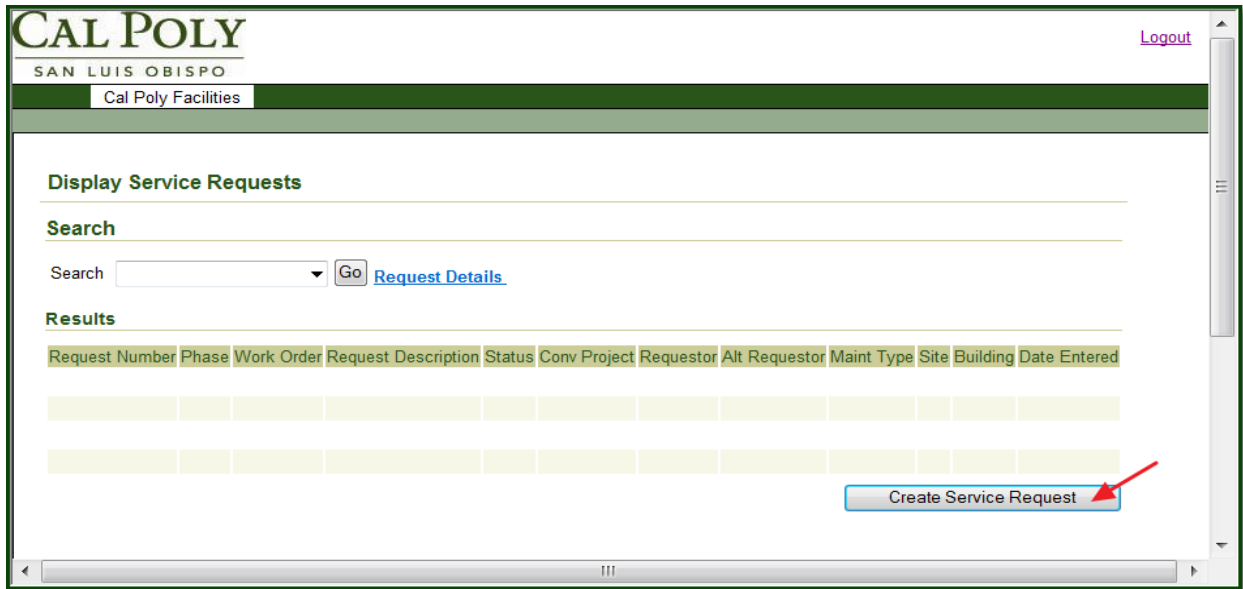
- From the **Single Click Access to . . .** menu on the My Cal Poly Portal webpage, click Facilities Requests



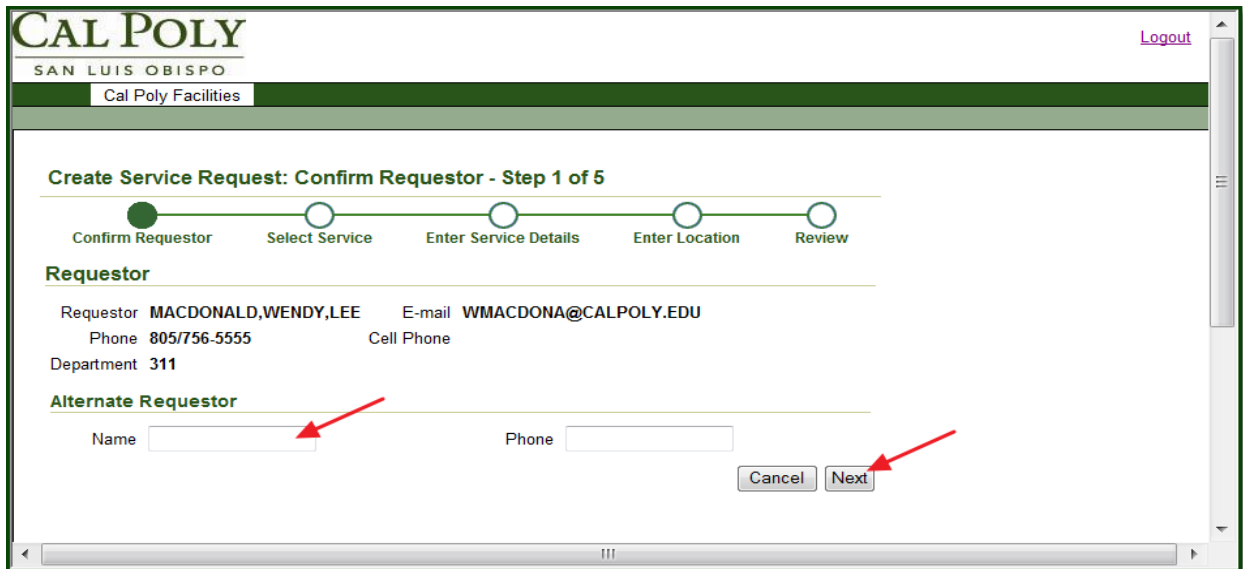
- Click – Service Requests



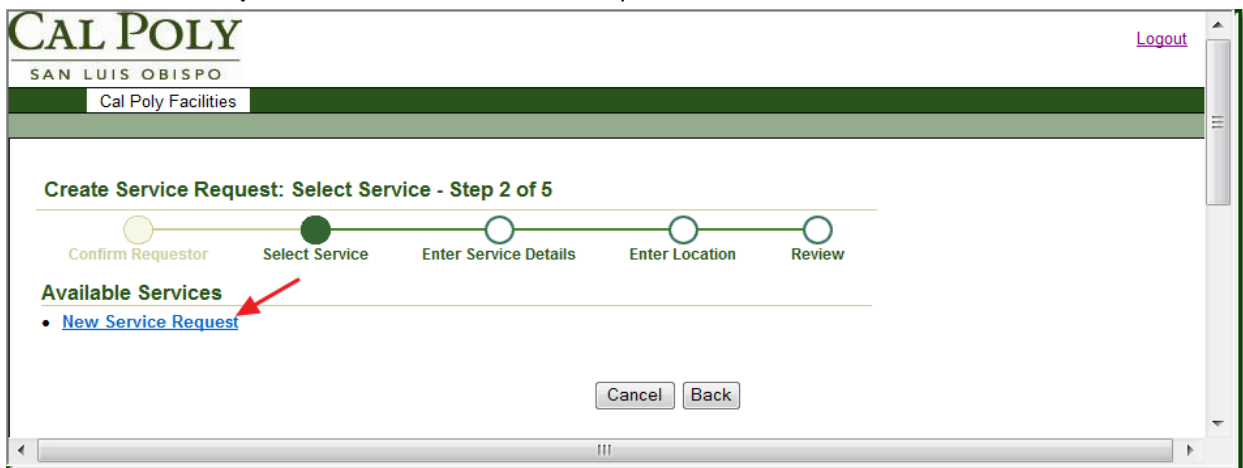
- Click – Create Service Request



- **Confirm Requestor – Step 1 of 5:** Your name will auto-fill as Requestor
- *Optional:* Add Alternate Requestor Name and Phone
- Click – Next



- **Select Service – Step 2 of 5:** Click – New Service Request



- **Enter Service Details – Step 3 of 5:**
- If you are unsure whether your request is maintenance or if it will require a chartfield string, click the **non-maintenance** link for more details

- If your request is for maintenance work, fill in the **Work Title** and **Description of Work** fields.
- If you have time constraints and would like to specify start and completion dates or times when the location is unavailable for work, you may indicate your preferences in the date fields near the bottom of the page. Facilities staff will make every effort to accommodate these needs.
- Click – Next

- If your request is for **non-maintenance** work, enter the chartfield string into the **Account** section
- Enter **100** in the **Pct** (percentage) field. If you are splitting the cost between two chartfield strings, enter the appropriate percentages such as 50/50. Percentages must total **100**.
- Fill in the **Work Title** and **Description of Work** fields
- If you would like an estimate for your **non-maintenance** request, type "ESTM:" at the beginning of the **Work Title** and an estimate will be provided before work begins. No charges will be incurred until after the estimate has been approved by the requestor. This process may delay the work start date.
- Click – Next

- If you have entered invalid data, the error will be displayed at the top of the screen. In this example an invalid Department ID number has been entered.

**NOTE:** Contact your department Coordinator or Analyst if you don't know your chartfield string.


The Work Center cannot supply this information. If you leave this area blank, the request will not be processed until a valid chartfield string has been supplied.

- **Enter Location – Step 4 of 5:**

- Click on the corresponding button for a list of values or enter a 3-digit Building number, a 1-digit Floor number, and a 4-digit Room number. A 3-digit building number may also be followed by a letter, for example, the Kinesiology building is 043A.
- These fields are optional but, if you cannot find your building and room number, be sure there is a clear description of the location in the **Description of Work** field. Click the **Back** button if you need to update this information.
- Click – Next

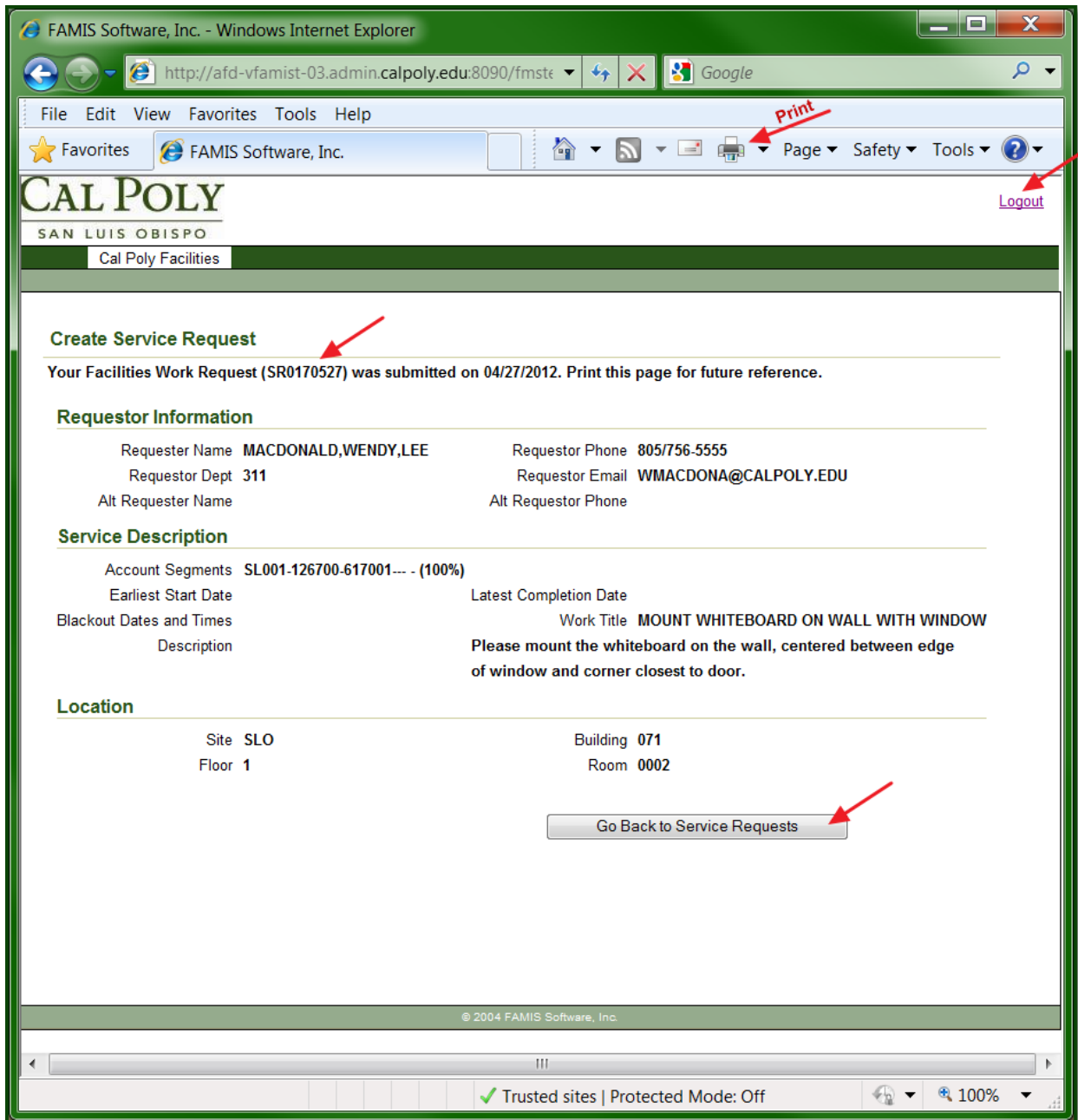
The screenshot shows a progress bar with five steps: Confirm Requestor, Select Service, Enter Service Details, Enter Location, and Review. The 'Enter Location' step is currently active. Below the progress bar, there are input fields for Site (SLO), Building (043A), Floor (2), and Room (0254). There are also 'Cancel', 'Back', and 'Next' buttons. Red arrows point to the 'Building' field and the 'Next' button.

- **Review – Step 5 of 5:**

- Click the Back button on your web browser  if changes are needed.
- If information is correct click – **Finish**

The screenshot shows a progress bar with five steps: Confirm Requestor, Select Service, Enter Service Details, Enter Location, and Review. The 'Review' step is currently active. Below the progress bar, there are three sections: 'Requestor Information', 'Service Description', and 'Location'. The 'Requestor Information' section includes fields for Requester Name (MACDONALD,WENDY,LEE), Requester Phone (805/756-5555), Requester Dept (311), Requester Email (WMACDONA@CALPOLY.EDU), Alt Requester Name, and Alt Requester Phone. The 'Service Description' section includes fields for Earliest Start Date, Latest Completion Date, Blackout Dates and Times, and Description (ESTM: MOUNT WHITEBOARD ON WALL WITH WINDOW Please center between door and window). The 'Location' section includes fields for Site (SLO), Building (043A), Floor (2), and Room (0254). There are 'Cancel' and 'Finish' buttons. A red arrow points to the 'Finish' button.

- Your Service Request has now been created. Please print a copy for your records.
- If you would like to create another request or view your existing requests, click the **Go Back to Service Requests** button.
- If you are finished, click **Logout** in the upper right-hand corner of the screen.



- If you click the **Go Back to Service Requests** button, you will be returned to the Display Service Requests screen where you may enter another request or view your current requests.

## To View your Existing Requests

- Click the pull-down menu button (▼) to see a list of options. Make selection and click Go

### Display Service Requests

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**Search**

Search  Go [Request Details](#)

**Results**

- My requests this week
- My requests last week
- My requests this month
- My requests last month
- All my requests

Request	Request Description	Status	Conv Project	Requestor	Alt Requestor	Maint Type	Site	Building	Date Entered

- A list of your Service Requests will be displayed.

Request Number	Phase	Work Order	Request Description	Status	Conv Project	Requestor	Alt Requestor	Maint Type	Site	Building	Date Entered
SR0170527		<a href="#">WO0189512</a>	MOUNT KEYBOARD TRAY	APPROVED		MACDONALD,WENDY,LEE		MOUNT/HANG SLO	071 - TRANSPORTATION SERVICES		04/27/2012
SR0170526		<a href="#">WO0189513</a>	MOUNT PICTURE OVER DESK	APPROVED		MACDONALD,WENDY,LEE		MOUNT/HANG SLO	004A - AERO HANGAR		04/27/2012
SR0170524			MOUNT WHITEBOARD	SS-REQUEST		MACDONALD,WENDY,LEE		MOUNT/HANG SLO	071 - TRANSPORTATION SERVICES		04/25/2012
SR0170523		<a href="#">WO0189511</a>	A6.01 - RECHARGE SERVICE REQUEST -	APPROVED		MACDONALD,WENDY,LEE		ADMIN	SLO 003 - BUSINESS		04/23/2012
SR0170522		<a href="#">WO0189514</a>	LIGHTS OUT IN ELEVATOR	APPROVED		MACDONALD,WENDY,LEE		ELEVATORS	SLO 001 - ADMINISTRATION		04/23/2012

Create Service Request

- If your request has been processed and a work order created, a work order number will appear.
- Click the work order number link to see a summary of all costs currently posted to that work order.

SR0159170	<a href="#">WO0178065</a>	KEY HARD TO TURN, GERIS #1 DRAWER - BLD 70 RM 100 - THANKS!!	CLOSED		MACDONALD,WENDY,LEE		LOCKS/KEYS	070 - FACILITY SERVICES / RECEIVING WRHS		01/12/2011
SR0157410	<a href="#">WO0176266</a>	REPAIR HEATING UNIT - NO HEAT - PCV - CANYON POST - 171A-A069	CLOSED		MACDONALD,WENDY,LEE		COLD/HOT	SLO 171A - PCV ALISO		12/01/2010

WORK ORDER COST REPORT											
=====											
WO Number: WO0176266			Description: REPAIR HEATING UNIT - NO HEAT - PCV - CANYON POST - 171A-A069								
Type:	COLD/HOT		Site:	SLO		Req Type:	Service				
Status:	CLOSED		Building:	171A		Req Number:	SR0157410				
Priority:	2		Floor:	1		Requestor:	MACDONALD,WENDY,LEE				
Method:	IN_HOUSE		Room:	A114		Telephone:	805/756-5555				
Crew:	229		Schedule Date:	01 DEC 2010		Mail Code:					
Craft:	6702		Due Date:	04 DEC 2010		Department:	311				
Est Hours:			Modify Date:	07 DEC 2010		CP Number:					
Assigned To:	1151214		GODFREY, MICHELLE R.								
Equipment: Nomenclature:											
Account						Percent					
Task List											
REPAIR HEATING UNIT - NO HEAT - PCV - 171A-A069 (CANYON POST)											
MC 42225											
WORK ORDER COMMENTS:											
CHECKED UNIT WORKING FINE, AREA IS COLD BECAUSE OF OPEN DOORS AND SERVICE WINDOW.											
Labor											
Crew Description	Crew	Work Date	Pay Code	Hours	Rate	Amount					
FACS PCV Crew Engineering Services	229	02 DEC 2010	REGULAR	1	53.36	53.36					
Total -						53.36					
Material											
Part Number	Description	Um	Quantity	Amount							
Total -						0.00					
Invoice											
PO Number	Release No	Line No	Vendor	Description							
Total -						0.00					
Committed Costs											
Preq/PO Number	Rel No	Line No	Vendor	I/S	Description	Amount					
Total -						0.00					
Miscellaneous Costs											
Enter Date	Cost Type	Description	Rate	Qty	Amount						
Total -						0.00					
Equipment Renta											
Trans. Date	Employee	Equipment	Hours	Rental Rate	Miles	Fuel Charge	Amount				
Total -						0.00					
Grand Total -						53.36					

- You may also click Request Details to search for a specific request number.

**Display Service Requests**

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**Search**

Search   [Request Details](#)

**Results**

Request Number	Phase	Work Order	Request Description	Status	Conv Project	Requestor	Alt Requestor	Maint Type	Site	Building	Date Entered
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**Display Service Requests**

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**Advanced Search**

**Request Number**

Request Number

**Display Service Requests**

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**Search**

Search   [Request Details](#)

**Results**

Request Number	Phase	Work Order	Request Description	Status	Conv Project	Requestor	Alt Requestor	Maint Type	Site	Building	Date Entered
<a href="#">SR0170524</a>			MOUNT WHITEBOARD ON WALL WITH WINDOW	SS-REQUEST		MACDONALD,WENDY.LEE			071 - MOUNT/HANG SLO TRANSPORTATION SERVICES		04/25/2012

[Click for Details](#)