

AGGIE FACILITIES Training

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Access the Aggie Facilities Homepage

There are two ways to log in to the system:

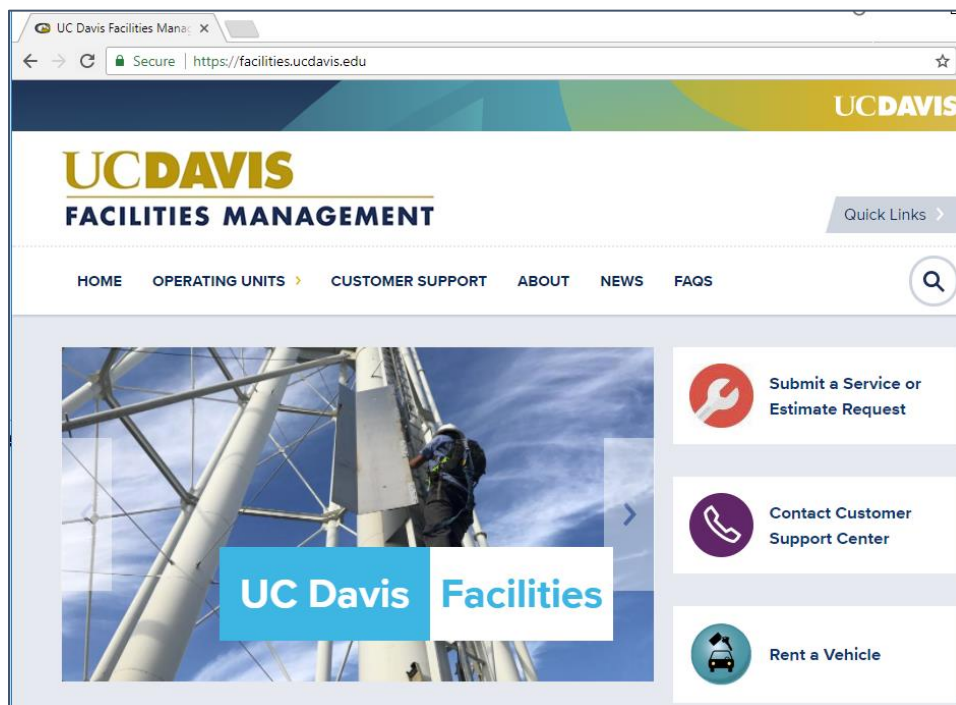
1. Open a window on Chrome or Internet Explorer and type <https://aggiefacilities.ucdavis.edu>. You will be redirected to the UC Davis Central Authentication Service (CAS). Enter your username (Kerberos ID) and passphrase and click on the login button.



The image shows the UC Davis Central Authentication Service (CAS) login page. At the top is the UC Davis logo in gold and blue, with the text 'UNIVERSITY OF CALIFORNIA' and 'Central Authentication Service (CAS)' below it. There are two input fields: 'Username:' and 'Passphrase:'. Below these is a blue 'LOGIN' button. A link for 'Need Help?' is provided. A security notice states: 'Protect your campus computing account login ID and passphrase. Use them only for campus websites and campus online services. UC Davis will never ask you to provide your passphrase via phone or email. A message that asks you to is probably a phishing scam. Delete it without responding. Be extremely wary of messages that ask you to enter your passphrase into a non-UC Davis website. If you have doubts about a message or website, or think you have been tricked into submitting your passphrase or personal information, call the IT Express Computing Services Help Desk at 530-754-HELP (4357). Copyright © Regents of the University of California, Davis campus. All Rights Reserved.'

OR

- Open a window on Chrome or Internet Explorer and type <http://facilities.ucdavis.edu>. Click the "Submit a Service or Estimate Request" button on the top right of the page. Just like with first option, you will be redirected to CAS to login.



This is the Aggies Facilities homepage:

Work Task ID	Task Description	Zone	Building	Floor	Room	Request Date	Task Assignment Status	Responsible Org	Responsible Person	Es As Da
1481949	The lights are out in the first floor lobby area.	C121	Earth and Physical Sciences Building			01/18/2018 13:17:53	Unassigned	FM Service Desk		
1481945	The main conference room needs to have the door repaired. It is making a loud g...	C050	Facilities Services			01/17/2018 16:02:22	Unassigned	BMS Lock Shop		
1481944	An alarm is sounding in the hallway	C050	Facilities Services			01/17/2018 15:58:18	Assigned	BMS Fire Alarm Shop	Steven Hamilton	
1481943	I need to have a white board hung in room 0104	C050	Facilities Services			01/17/2018 15:55:06	Unassigned	BMS Carpentry Routine		02
1481942	My office is being overrun by Ants. Room 0106	C050	Facilities Services			01/17/2018 15:53:50	Unassigned	BMS Pest Control		01
1481941	The roof is leaking and water is dripping onto the main hallway	C050	Facilities Services			01/17/2018 15:53:02	Assigned	BMS Roofing Shop	James Acosta	
1481940	Room 0087 is too cold. Can someone please check it out.	C050	Facilities Services			01/17/2018 15:51:30	Unassigned	BMS HVAC Controls Shop		
1481939	the Lights are out in Room 0097	C050	Facilities Services			01/17/2018 15:50:41	Unassigned	FM Service Desk		
1481938	The toilet in the Men's restroom is clogged	C050	Facilities Services			01/17/2018 15:49:42	Unassigned	FM Service Desk		
1481937	The windows of the main entrance have a crack in them and need to be replaced	G130	Vet Med 3A			01/17/2018 15:39:00	Unassigned	FM Service Desk		

The homepage is divided into portals for easy navigation, they are:

1. The request central provides the types of request you can submit:
 - a. Service request
 - b. Estimate request
2. The reminders portal allows access to email notifications: The action items link is used for reviewing and approving estimates. The notifications link shows emails you have received, allowing you to follow the progress of a work task.
3. Related links are shortcuts to specific queries allowing you to access your content and historical work tasks, estimates, projects, your profile and watchlist.
4. My work tasks, my active estimates, my projects and my watchlists (selected work tasks and buildings) display your most current active information for each portal.

Functionalities

Use the plus and minus buttons to expand or collapse a portal for easy navigation.



A screenshot of the expanded "My Watchlist (Selected Work Tasks)" portal. The expand button (minus icon) is highlighted with an orange square. Below the header is a table with four columns: Work Task ID, Task Name, Task Description, and a partially visible column on the right. Two rows of data are shown.

Work Task ID	Task Name	Task Description	Zo
1072398	P DEFAULT - Work Task Template - Corrective Maintenance- Building Interior - othe...	NOTE TO LOGISTICS FROM FSD: BUILDING WILL BE OCCUPIED BY CONF HSG GUESTS (CHEER ...	DC
1068101	DEFAULT - Work Task Template - Corrective Maintenance- Bathroom Hardware	NOTE TO MAINTENANCE FROM FSD: BUILDING IS CURRENTLY VACANT. BUILDING WILL BE OCC...	DC

Scroll horizontally (left and right) on the page to view additional information

Scroll down a portal and click on the more button in the bottom right corner to view all the items under that tab.

Use the drop down selector in the upper right corner to determine how many items you want displayed at a time.

Alternatively, click on the maximize button in the upper right corner within a portal to view all the items on a new window.

To access all work tasks currently in the system:

1. Select All Work Tasks, listed under Related Links-Request Central on the homepage.

2. Use the search boxes to narrow your search results.

<input type="checkbox"/>	Task ID	Task Name	Task Description	Zone	Location	Floor	Room	Request Date	Task Assignment Status	Responsible Organization	Responsible Person
	<input type="text" value="Containr"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Containr"/>	<input type="text" value="Contains"/>	<input type="text" value="Containr"/>	<input type="text" value="Contains"/>		<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>

3. Type in your search term and hit enter, or click on the apply filter button. Please note that more than one search field can be used at a time.

4. Click anywhere on a specific task to view additional details.

Submitting a Service Request

This section provides instructions on submitting a general service request for repairs and routine cleaning:

From the home page, click on “Service Request” on the Request Central menu, the form will display.

The screenshot shows the 'AGGIE FACILITIES' Service Request form. It includes sections for 'Request is for' (Me/Someone Else), 'Alternate Contact' table, 'Request Details' (Location, Organization), 'Additional Locations' table, 'Describe Your Request' (Description), 'Comments' table, 'Accounting Details' (Authorized Amount, Accounting Code, Sub-Accounting Code, Project Code, Object Code), and 'Related Documents' table. Numbered callouts 1 through 9 highlight specific form elements: 1 points to the 'Request is for' radio buttons; 2 points to the 'Add' button in the 'Alternate Contact' section; 3 points to the 'Location' search boxes; 4 points to the 'Add' button in the 'Additional Locations' section; 5 points to the 'Description' text area; 6 points to the 'Add' button in the 'Comments' section; 7 points to the 'Accounting Details' section; 8 points to the 'Add' button in the 'Related Documents' section; and 9 points to the 'Submit' button at the bottom right.

1. Indicate whether you are making this request for Me or Someone Else. When selecting someone else type the first and last name of the employee or a portion of the name and select from the choices displayed or click the magnifying glass for additional search options. Use the search boxes to enter information narrowing your search results, hit enter or click apply filters.
2. Add an alternate contact for this specific Service Request. To add an alternate contact person, click on the add button to display the search tab, find the person you want to add, select it, and click on the add button again.

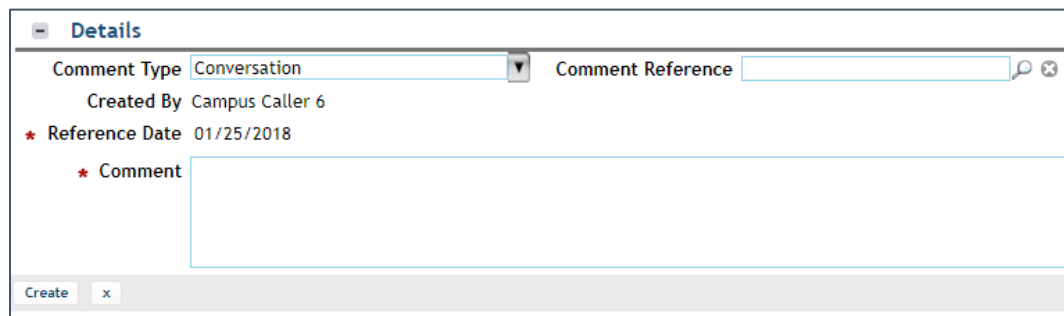
3. Under Request Details, list the following details for the space you are requesting service.

Please Note: You can type the name (or portion) of each in the corresponding field, or select the magnifying glass to the right of each row to narrow down your search, and choose from the dropdown menu.

- a. Location (Building Name)
- b. Zone
- c. Floor
- d. Room
- e. Organization

The fields marked with a red asterisk must be completed.

4. Use the additional locations section to include multiple room numbers or floors. Click find, select the appropriate check boxes and click on OK.
5. On the description section, enter specific details fully describing your request.
6. Click on the add button to add a comment. A pop-up window opens up. Select the type of comment from the dropdown menu, and type in your comment. Click on create to exit this window.



The screenshot shows a 'Details' pop-up window with the following fields and controls:

- Comment Type:** A dropdown menu currently set to 'Conversation'.
- Comment Reference:** A text input field with a magnifying glass icon and a close button (X).
- Created By:** A text field containing 'Campus Caller 6'.
- * Reference Date:** A text field containing '01/25/2018'.
- * Comment:** A large text area for entering the comment.
- Buttons:** 'Create' and 'x' (close) buttons at the bottom left.

7. Use the accounting details section when a recharge number is necessary. Enter the applicable information in each field.
8. The last section is the related documents. To upload a document or photo, click on the upload button. The attach object window pops up. Drop your files here or click on the single upload link. Select the file you wish to upload, fill out the other fields available on this screen, and click on submit.
9. Click on the submit button and your request will be forwarded to the Customer Support Center for processing. The work task will appear in the "My Work Tasks" portal on the homepage. If you don't see it after 2 minutes, refresh your browser.
There is also an option to create a Draft – this will allow you to complete the draft for submission at a later date. Draft requests will appear in the "My Un-submitted Requests" portal.

Submitting an Estimate Request

From the home page, click on “Estimate Request” on the Request Central menu in the top left-hand corner. The Estimate Request form will display.

Form Part 1

The screenshot shows the 'AGGIE FACILITIES' web application interface. The top navigation bar includes a 'Home' button. Below it, the breadcrumb trail reads 'Home > Estimate Request'. On the right, there are links for 'Print' and 'Open In New Window', and a 'Request Estimate' button. The main content area is titled '(Instruction): To submit a Funding Request, complete the form below then click Submit.' and contains several sections:

- Request Is For:** A section with two radio buttons: 'Me' (selected) and 'Someone Else' (labeled with a yellow circle 1).
- Alternate Contact:** A section with an 'Add' button and a 'Remove' button. Below it is a table with columns: Name, Work Phone, Mobile Phone, and Email. The table is currently empty (labeled with a yellow circle 2).
- Request For:** A section with two radio buttons: 'Program Funding' (selected) and 'Project or Operational Funding' (labeled with a yellow circle 3).
- Estimate Description:** A text input field.
- Requested Start Date:** A date picker.
- Funding Type:** A dropdown menu.
- Request Details:** A section with four text input fields: Location, Zone, Floor, and Room. Each field has a magnifying glass icon to its right (labeled with a yellow circle 4).
- Organization:** A text input field.
- Describe Your Request:** A large text area (labeled with a yellow circle 5).
- Service Request:** A section with an 'Add' button and a 'Remove' button. Below it is a table with columns: Name and Description. The table is currently empty (labeled with a yellow circle 6).
- Comments:** A section with an 'Add' button. Below it is a table with columns: Reference Date, Comment, Comment Type, and Created By. The table is currently empty (labeled with a yellow circle 7).

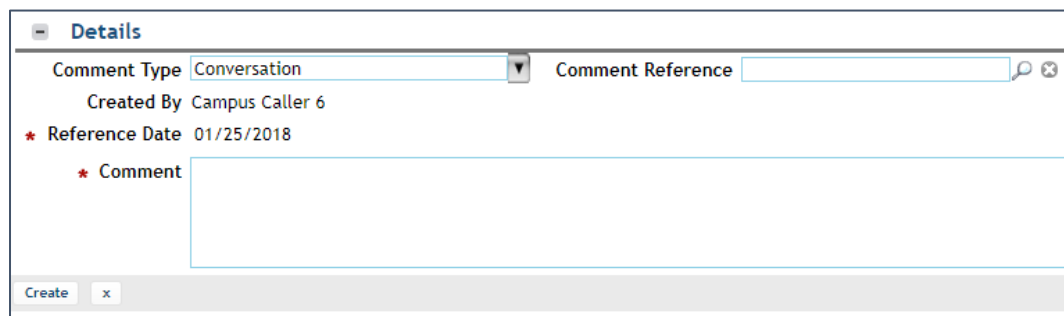
1. **Request is For:** Indicate whether you are making this request for Me or Someone Else. When selecting someone else type the first and last name of the employee or a portion of the name and select from the choices displayed or click the magnifying glass for additional search options. Use the search boxes to enter information narrowing your search results, hit enter or click apply filters.
2. **Alternate Contact:** Add an alternate contact for this specific Estimate Request. Add an alternate contact to specify someone to act on your behalf for a request if you are unavailable. To add an alternate contact person, click on the add button to display the search tab, find the person you want to add, select them, and click on the add button again.
3. Indicate if this Estimate is for "Program Funding" or "Project or Operational Funding." Provide a short estimate description, requested start date and funding type if known. The fields marked with a red asterisk must be completed.
4. **Request Details:** List the following details for the space you are requesting service.
 - a. Location (Building Name)

- b. Zone
- c. Floor
- d. Room
- e. Organization

The fields marked with a red asterisk must be completed.

Please Note: You can type the name (or portion) of each in the corresponding field, or select the magnifying glass to the right of each row to narrow down your search, and choose from the dropdown menu.

5. **Describe Your Request:** Enter specific details fully describing your request.
6. **Service Request:** Choose major or minor project estimate by selecting the corresponding bubble.
7. **Comments:** Click on the add button to add a comment. A pop-up window opens up. Select the type of comment from the dropdown menu, and type in your comment. Click on create to exit this window.



The screenshot shows a 'Details' window with the following fields and controls:

- Comment Type:** A dropdown menu currently showing 'Conversation'.
- Comment Reference:** A text input field with a magnifying glass icon to its right.
- Created By:** A text field containing 'Campus Caller 6'.
- * Reference Date:** A text field containing '01/25/2018'.
- * Comment:** A large text area for entering the comment.
- Buttons:** 'Create' and 'x' (close) buttons at the bottom left.

Form Part 2

The screenshot displays a web form titled 'Form Part 2' with several sections. Yellow circles with numbers 8 through 14 are overlaid on the form to indicate specific areas of interest:

- 8** points to the 'Accounting Details' section, which includes fields for Accounting Code, Sub-Accounting Code, Project Code, and Object Code.
- 9** points to the 'Related Documents' section, which includes an 'Export' button, a table of documents, and an 'Upload' button.
- 10** points to the 'Estimate Manager' section, which includes a table of estimates.
- 11** points to the 'Estimated Cost and Rating Summary' section, which includes a table of cost estimates.
- 12** points to the 'Additional Costs' section, which includes a table of additional costs.
- 13** points to the 'Scope' section, which includes a table of scope items.
- 14** points to the 'Request Estimate' button at the bottom of the form.

8. **Accounting Details:** Use this section when a recharge number is necessary. Enter the applicable information in each field.
9. **Related Documents:** To upload a document or photo, click on the upload button. The attach object window pops up. Drop your files here or click on the single upload link. Select the file you wish to upload, fill out the other fields available on this screen, and click on submit.
10. **Estimate Manager:** This section will be completed by a Facilities IPE – no information is required.
11. **Estimated Cost and Rating Summary:** Enter the authorized amount in the authorized amount field.
12. **Additional Costs:** This section will be completed by a Facilities IPE – no information is required.
13. **Scope:** This section will be completed by a Facilities IPE – no information is required.
14. Click on the Request Estimate and your request will be forwarded to a Facilities IPE for processing. The estimate request will appear in the "My Active Estimates" portal on the homepage. If you don't see it after 2 minutes, refresh your browser.

Approving Estimates

Minor project estimate requests do not require an approval process and will appear in the "My work tasks" portal. Major projects estimates do require approval. Major project estimates are when multiple trades are on the same project or it is greater than \$10,000.

To approve your major project estimate:

1. Click the action items link in the Reminders – Request Central portal on the homepage.
2. From the actions portal select the item to open by clicking anywhere on the line.
3. Click linked record to display the estimate.
4. Use the scroll bar on the right to view the details and scope provided by the IPE.
5. After review, close the estimate by clicking the x in the upper right corner.
6. You are now ready to approve, reassign, request clarification or return by using the buttons at the top. Click the appropriate button and add your review comment, click continue, a notification will be sent to the IPE indicating your selection. The action item will be removed from your queue at this time.

A project is created when the request for a major project estimate has been approved, details will be displayed in the "My projects portal" on the home page.

My Watchlist (Selected Buildings)

This feature allows you to monitor all tasks for entire buildings

1. Select Watchlist from Related Links – Request Central portal on the homepage.
2. Select Watchlist Type - Building from the dropdown.

The screenshot shows the 'AGGIE FACILITIES' interface. The 'Watchlist Type' dropdown menu is open, showing options: 'Building' (selected), 'Task', and 'Task'. The 'Status' is 'Active'. The 'Person' is 'Campus Caller 6'. The 'Close Page' button is visible.

3. Use the search fields to narrow your search. Select the box next to the building to add to your watchlist. Multiple buildings can be selected. Click add to watch list.

The screenshot shows the 'Buildings to Select' section. The table has columns: Zone, Name, Type, Address, City, State, and CAAN #. The row for 'C010' (Shields Library) is highlighted. The 'Add to Watchlist' button is highlighted. The 'Status' is 'Active'. The 'Watchlist Type' is 'Building'. The 'Close Page' button is visible.

Zone	Name	Type	Address	City	State	CAAN #
Contains	shields	Contains	Contains	Contains	Contains	Contains
<input checked="" type="checkbox"/> C010	Shields Library	Building	100 West Quad Bikeway	Davis	California	3390

4. Once you have added the selected building(s), they will appear in the Buildings Currently Watching section

The screenshot shows the 'Buildings Currently Watching' section. The table has columns: Zone, Name, Type, Address, City, State, and CAAN #. The row for 'C010' (Shields Library) is highlighted. The 'Remove' button is visible. The 'Status' is 'Active'. The 'Watchlist Type' is 'Building'. The 'Close Page' button is visible.

Zone	Name	Type	Address	City	State	CAAN #
Contains	shields	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/> C010	Shields Library	Building	100 West Quad Bikeway	Davis	California	3390

5. Once added there is an option to Remove building(s) from the watchlist as above.

When finished adding buildings to your watchlist click the close page button in the upper right corner to return to your home page. All watchlist buildings will be displayed on the home page in the corresponding portal.

Tasks to Select															Add to Watchlist		
<div> <div>Export</div> <div>2 total found</div> <div>Apply Filters</div> <div>Clear Filters</div> </div>															Show: 50		
Work Task ID	Task Name	Task Description	Zone	Building	Floor	Room	Request Date	Task Assignment Status	Responsible Org	Responsible Person	Responsible Person Work Phone	Estimated Assignment Date	Date Assigned	Task Priority			
<input type="checkbox"/>	Contains:	Contains	Contains	Contains:	mondavi	Contains:	Contains	After	Assigned	Contains	Contains	Contains	After	After	medium		
<input type="checkbox"/>	1466524	PENDING RECHARGE --> Phone lines down	Multiple phone lines not responding, sent w/o to alarm shop per Matt Monroe	C112	CFA Mondavi		06/18/2017 09:42:13	Assigned	BMS Fire Alarm Shop	Matthew Monroe	530-752-1495		06/18/2017 09:49:12	Medium			
<input type="checkbox"/>	1477119	DEFAULT - Work Task Template - Corrective Maintenance Alarms	replace 2- 18 amp hour battery at batteries for voice evacuation system	C112	CFA Mondavi		07/25/2017 10:26:10	Unassigned	Asset Management				07/25/2017 10:26:24	Medium			

Tasks Currently Watching															Remove	
<div> <div>0 total found</div> </div>															Show: 10	
Work Task ID	Task Name	Task Description	Zone	Building	Floor	Room	Request Date	Task Assignment Status	Responsible Org	Responsible Person	Responsible Person Work Phone	Estimated Assignment Date	Date Assigned	Task Priority	R	B
No data to display																

My PM Tasks

Select My PM tasks from Related Links – Request Central. Active PM's tasks that are 2 months out will be displayed when a building is added to the watchlist.

AGGIE FACILITIES															
Home															
Home > My PM Tasks															
Open In New Window															
Popup View															
1 / 37 Export 368 total found Apply Filters Clear Filters Show: 10															
Work Task ID	Location	Zone	Task Name	Planned Start Date	Assignment Status	Responsible Org	Responsible Person	Task Status	Task Priority	Responsible Person Work Phone	Total Estimated Cost	Actual Total Cost	Account Code	Sub Account Code	Proj Acc Code
1033249	Shields Library	C010	PM-C010- Pest Control	03/01/2018 08:00:00	Unassigned	BMS Pest Control		Planned	Low		\$.00	\$.00	3-MAINRC1	BUILD	
1076136	Shields Library	C010	PM-C010- Fire Pump- Monthly Test	03/01/2018 08:00:00	Unassigned	BMS Plumbing Construction and Fire Protection		Planned	PM Regulatory		\$41.50	\$.00	3-6755883	M0140	
1038186	Shields Library	C010	PM-C010- Elevator and Lifts Traction Shields Library Fire Recall - Route 3	03/01/2018 08:00:00	Unassigned	BMS Elevator Shop		Planned	PM Regulatory		\$.00	\$.00	3-6755880	BE102	

My PM History displays all completed work tasks for a building on the watchlist.

Note: when a building is removed from the watch list all pm tasks and history will no longer be displayed.

My Profile/General tab

This section allow updates to be made to your profile

The screenshot shows the 'AGGIE FACILITIES' web application. The user is on the 'Home > My Profile' page, specifically the 'General' tab. The page has a blue header with the 'Home' button. Below the header, there's a breadcrumb trail 'Home > My Profile' and links for 'Print' and 'Open In New Window'. The 'General' tab is active, and there's a 'Save & Close' button. The main content area is titled '(Required): Manage general Information about this person.' and contains three sections: 'General', 'Details', and 'Contact Information'. The 'General' section includes fields for ID (1053280), Status (Active), Image, Last Name (Caller 6), First Name (Campus), Full Name (Campus Caller 6), Prefix (Mr.), and Nick Name. The 'Details' section includes Title and Primary Organization. The 'Contact Information' section includes Work Phone, Mobile (8282829191), and Email. A red message at the top of the 'General' section says: 'To change your Name, Work Phone or Email, please update the campus directory at directory.ucdavis.edu'. A red message at the bottom of the 'Details' section says: 'To update your Primary Organization contact Customer Support at 530-752-1655 or facilities@ucdavis.edu'. The 'Mobile' field is highlighted with a red box, and the 'Save & Close' button is also highlighted with a red box.

Your Mobile phone number can be updated in this section, all other contact information should be updated through the campus directory at <http://directory.ucdavis.edu>

To update the primary organization contact the Customer Support Center at 752-1655 or email facilities@ucdavis.edu

My Profile/My notifications

This section is used to manage the notifications received regarding your tasks

Check the box next to any auto-notification you do not want to receive. Then click save & close.

The screenshot shows the 'AGGIE FACILITIES' web application. The user is on the 'Home > My Profile' page, specifically the 'My Notifications' tab. The page has a blue header with the 'Home' button. Below the header, there's a breadcrumb trail 'Home > My Profile' and links for 'Print' and 'Open In New Window'. The 'My Notifications' tab is active, and there's a 'Save & Close' button. The main content area is titled '(Optional): My Notification preferences.' and contains a section titled 'Notification Options'. This section includes a red message: 'Check the box next to any auto-notifications you do not want to receive'. Below this message are four checkboxes: 'Do Not notify me when a request is Received / Routed', 'Do Not notify me when a request is Assigned', 'Do Not notify me when a request is Cancelled', and 'Do Not notify me when a request is Completed'. The 'Do Not notify me when a request is Assigned' checkbox is checked. The 'Save & Close' button is highlighted with a red box.