# AGGIE FACILITIES Training

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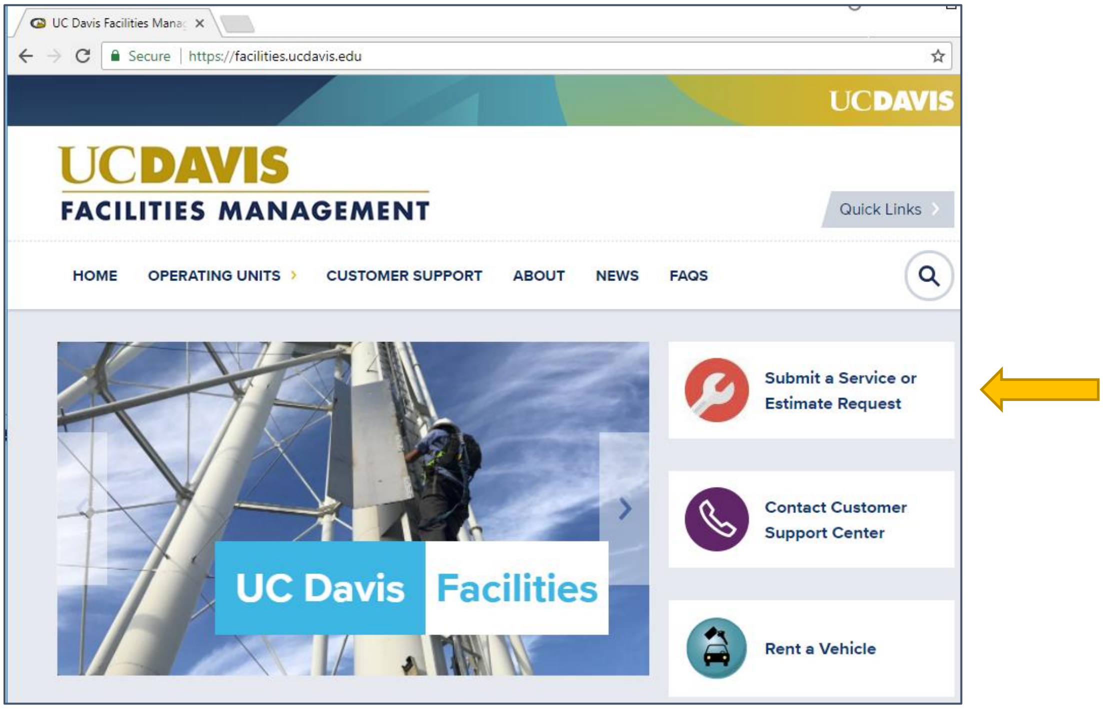
## Access the Aggie Facilities Homepage

There are two ways to log in to the system:

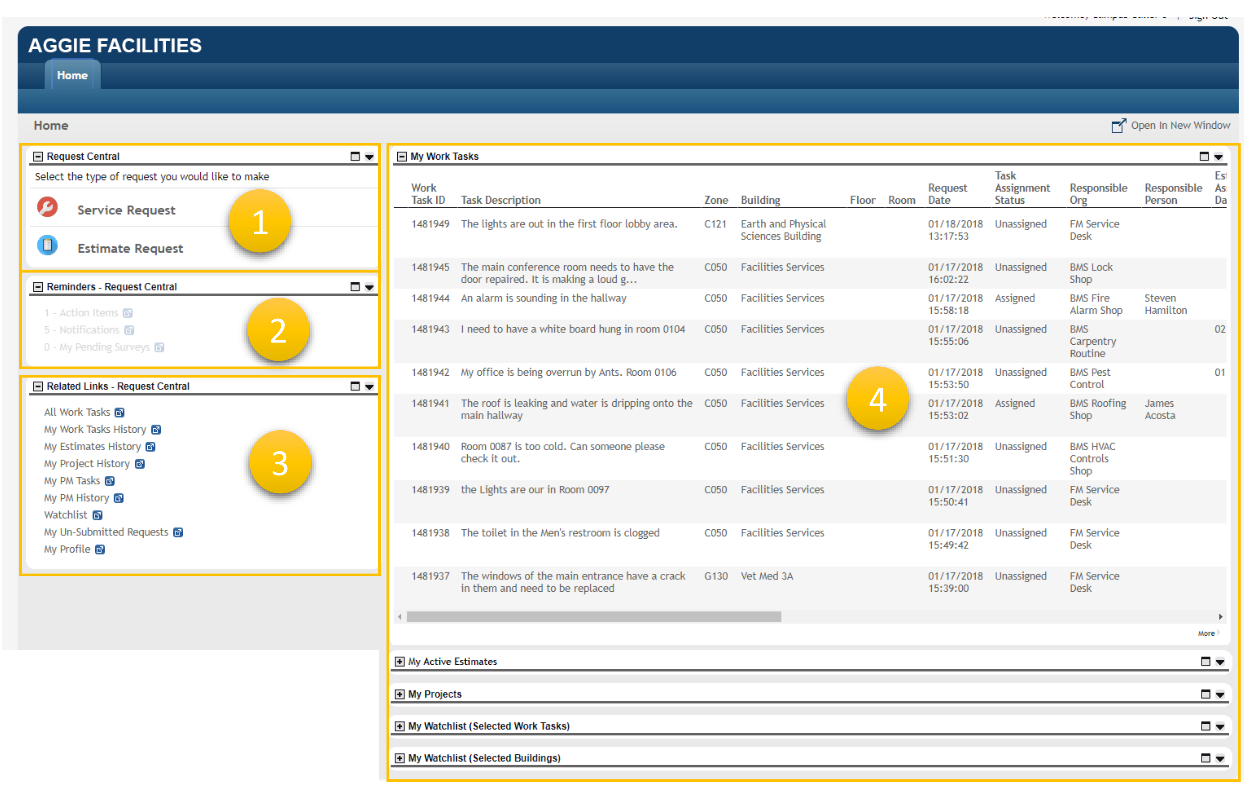
1. Open a window on Chrome or Internet Explorer and type https://aggiefacilities.ucdavis.edu. You will be redirected to the UC Davis Central Authentication Service (CAS). Enter your username (Kerberos ID) and passphrase and click on the login button.


**OR**

2. Open a window on Chrome or Internet Explorer and type [http://facilities.ucdavis.edu](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:

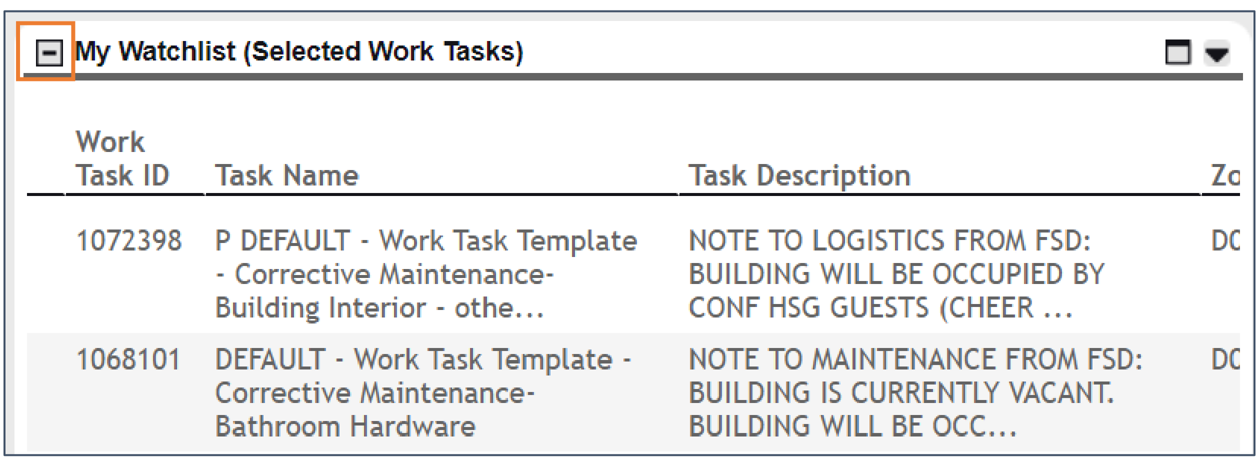


The homepage is divided into portals for easy navigation, they are:

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.

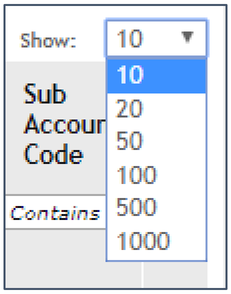


My Watchlist (Selected Work Tasks)

| 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.

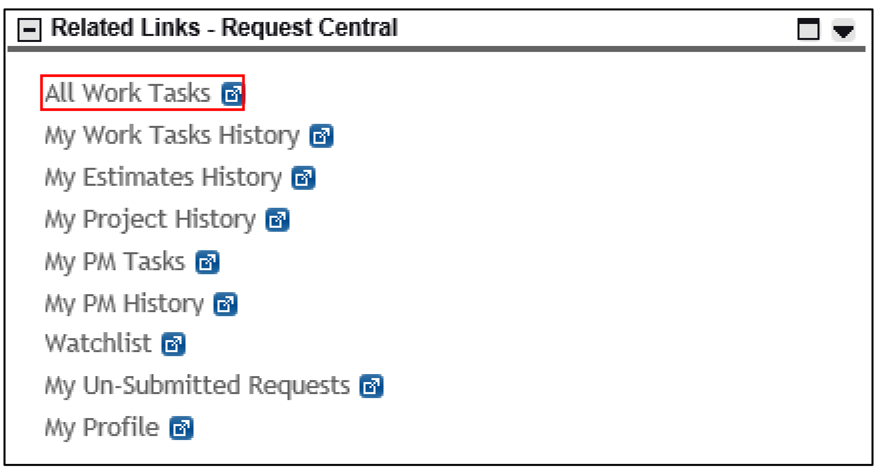
Use the drop down selector in the upper right corner to determine how many items you want displayed at a time.



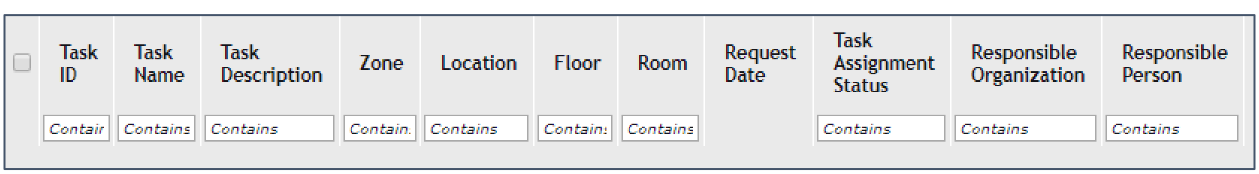

Alternatively, click on the maximize button in the upper right corner within a portal to view all the items on a new window.


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.



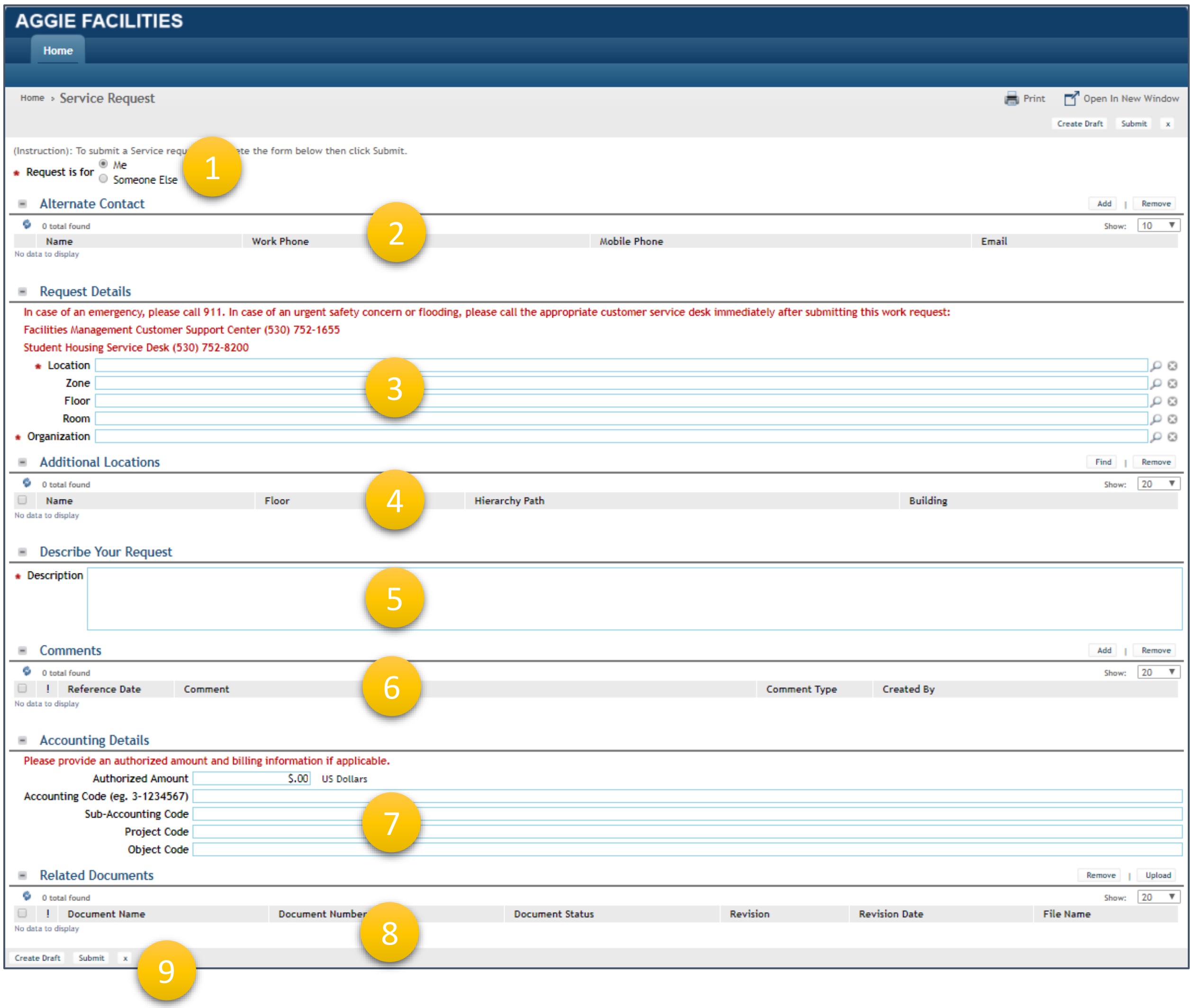

3. Type in your search term and hit enter, or click on the apply filter button. Please note that more than one search field can be used at a time.

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.




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.

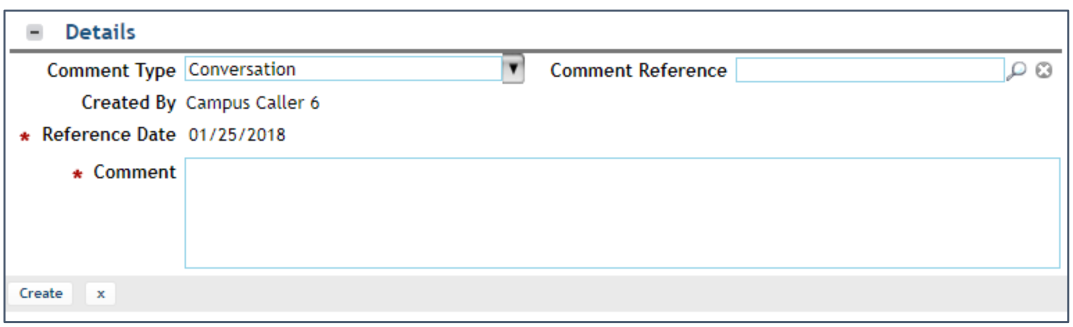
   a. Location (Building Name)
   b. Zone
   c. Floor
   d. Room
   e. Organization

   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.




7. Use the accounting details section when a recharge number is necessary. Enter the applicable information in each field.

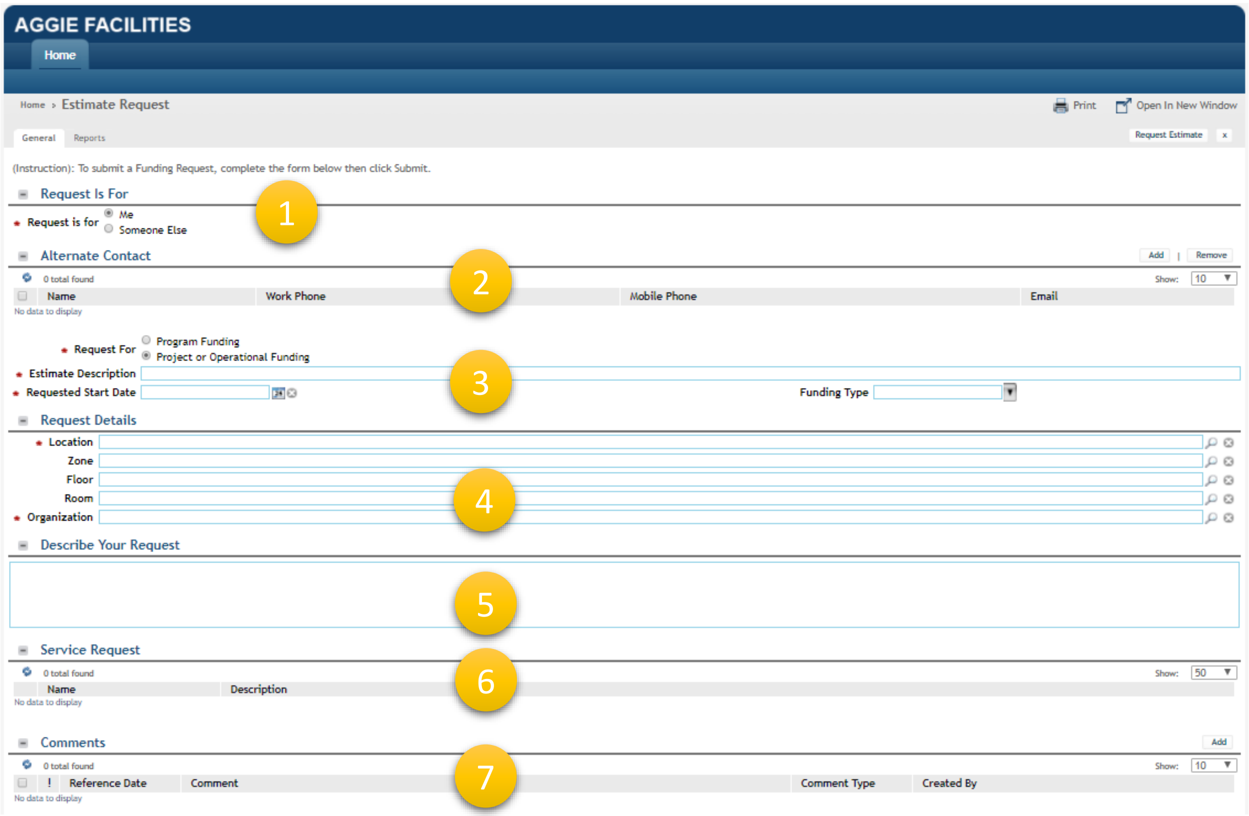
8. The last section is the related documents. To upload a document or photo, click on the upload button. The attach object window pops up. Drop your files here or click on the single upload link. Select the file you wish to upload, fill out the other fields available on this screen, and click on submit.

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**




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

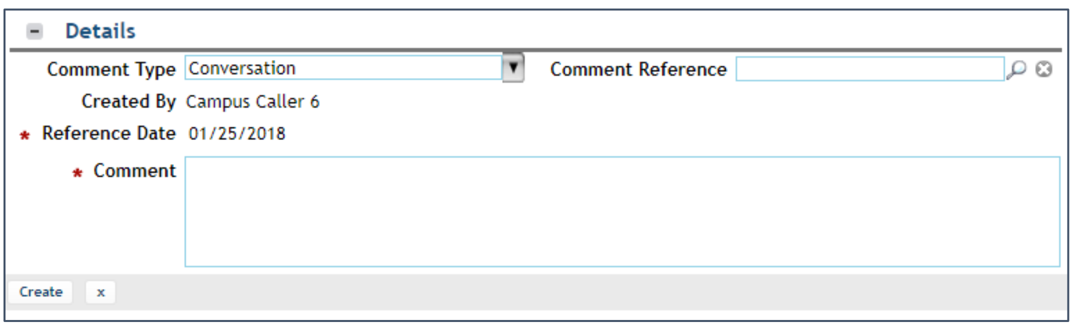
The fields marked with a red asterisk must be completed.

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.

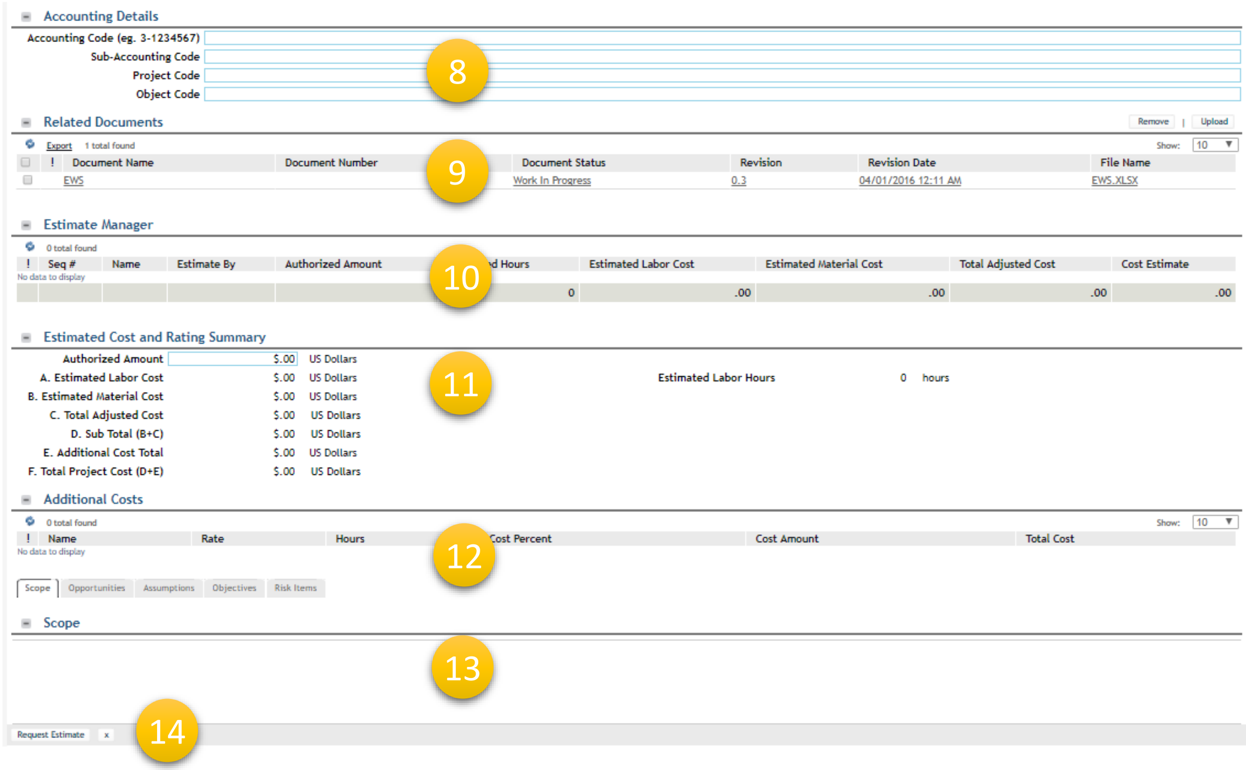
5. **Describe Your Request:** Enter specific details fully describing your request.

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.



## Form Part 2




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:**

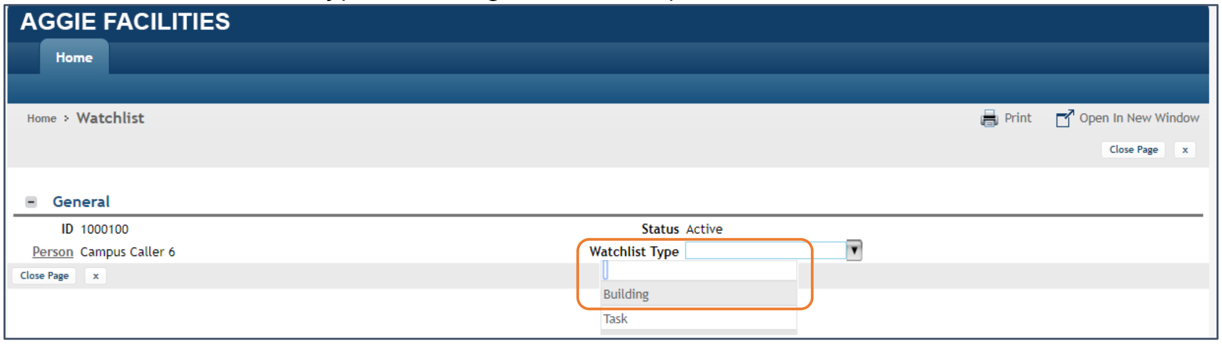
1. Click the action items link in the Reminders – Request Central portal on the homepage.
2. From the actions portal select the item to open by clicking anywhere on the line.
3. Click linked record to display the estimate.
4. Use the scroll bar on the right to view the details and scope provided by the 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.

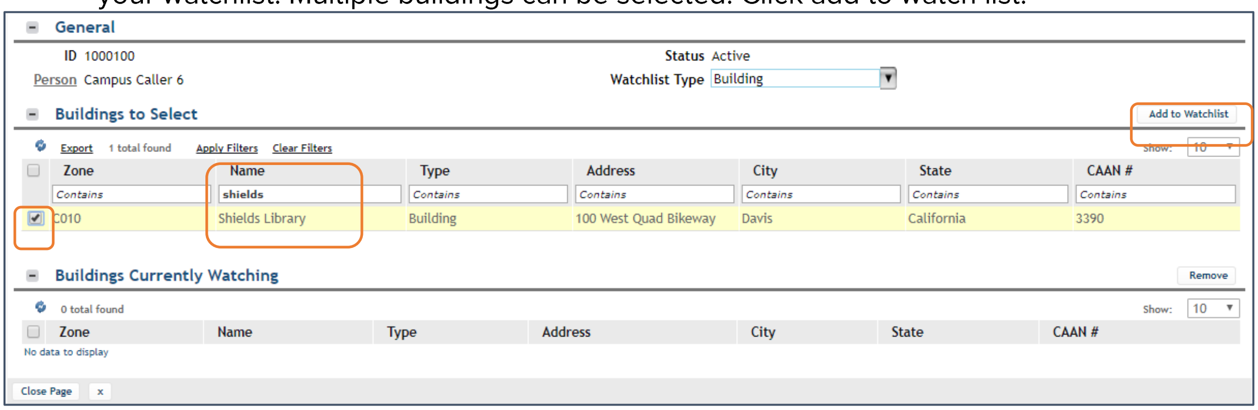
## My Watchlist (Selected Buildings)

This feature allows you to monitor all tasks for entire buildings

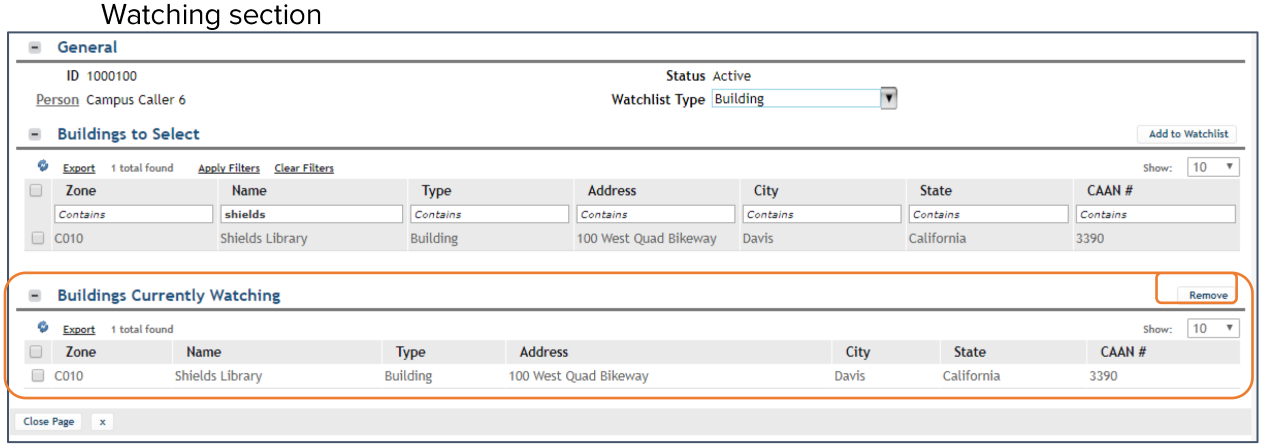
1. Select Watchlist from Related Links – Request Central portal on the homepage.
2. Select Watchlist Type - Building from the dropdown.




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.




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



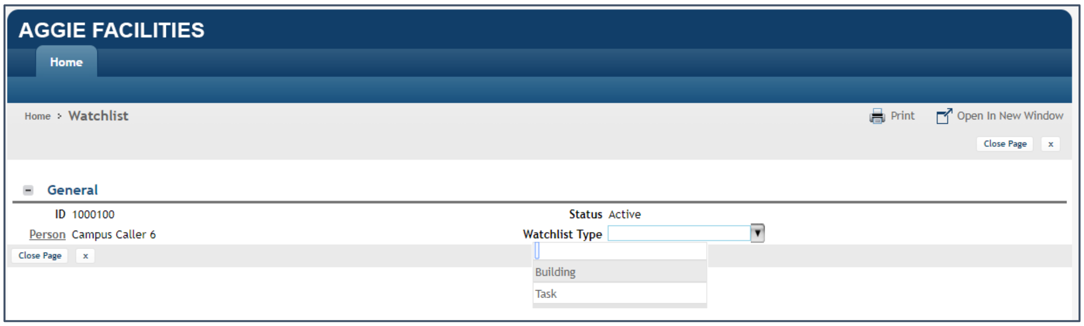

5. Once added there is an option to Remove building(s) from the watchlist as above.

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.

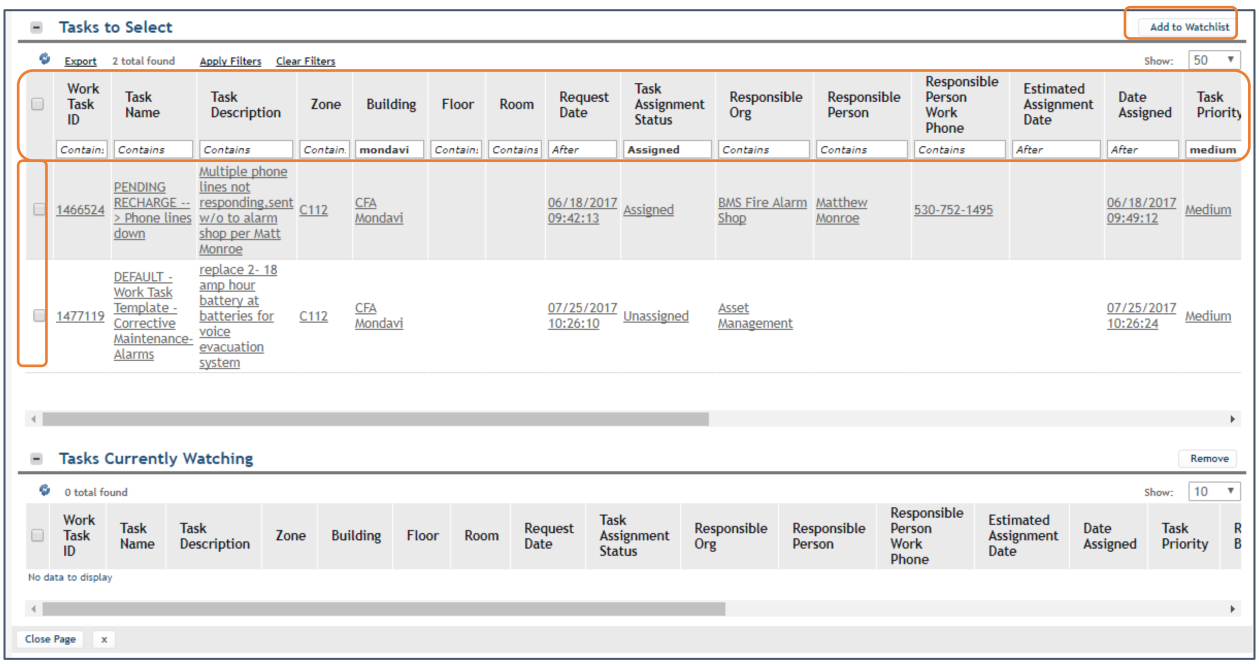
# My Watchlist (Selected Work Tasks)

This feature allows you to monitor selected tasks and individual tasks submitted by other users.

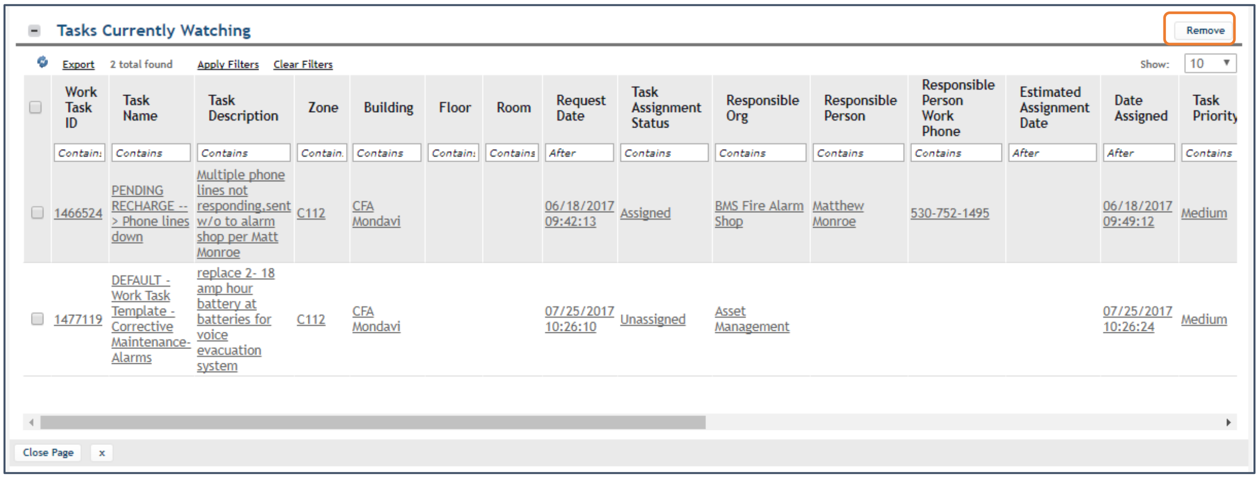
Select Watchlist from Related Links – Request Central. Select watchlist type Task from the dropdown.




Use the search fields to narrow search. Select the box next to the tasks to add to your watchlist. Multiple tasks can be selected.

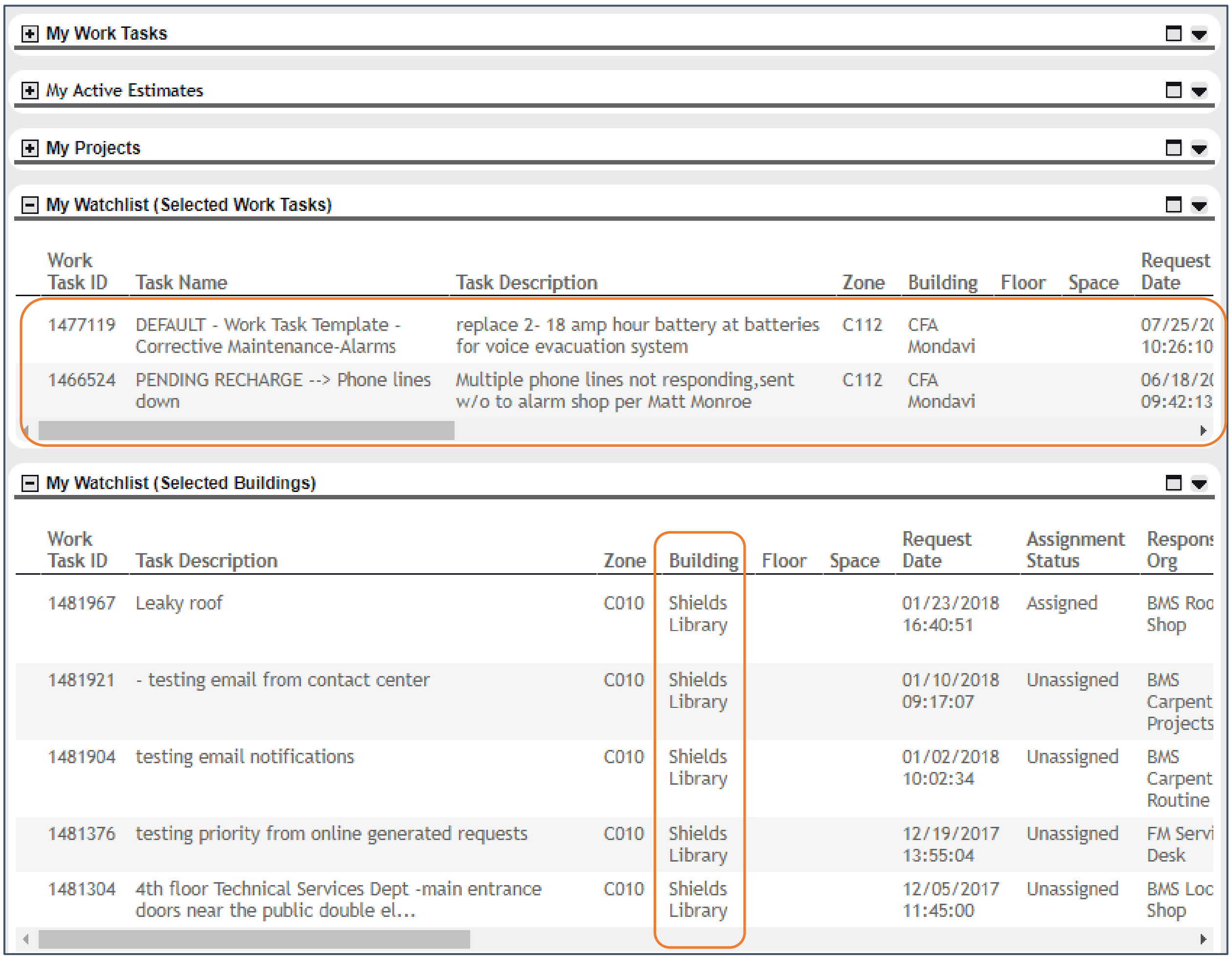


Add to watchlist. Once added the selected task(s) will appear in tasks currently watching section.



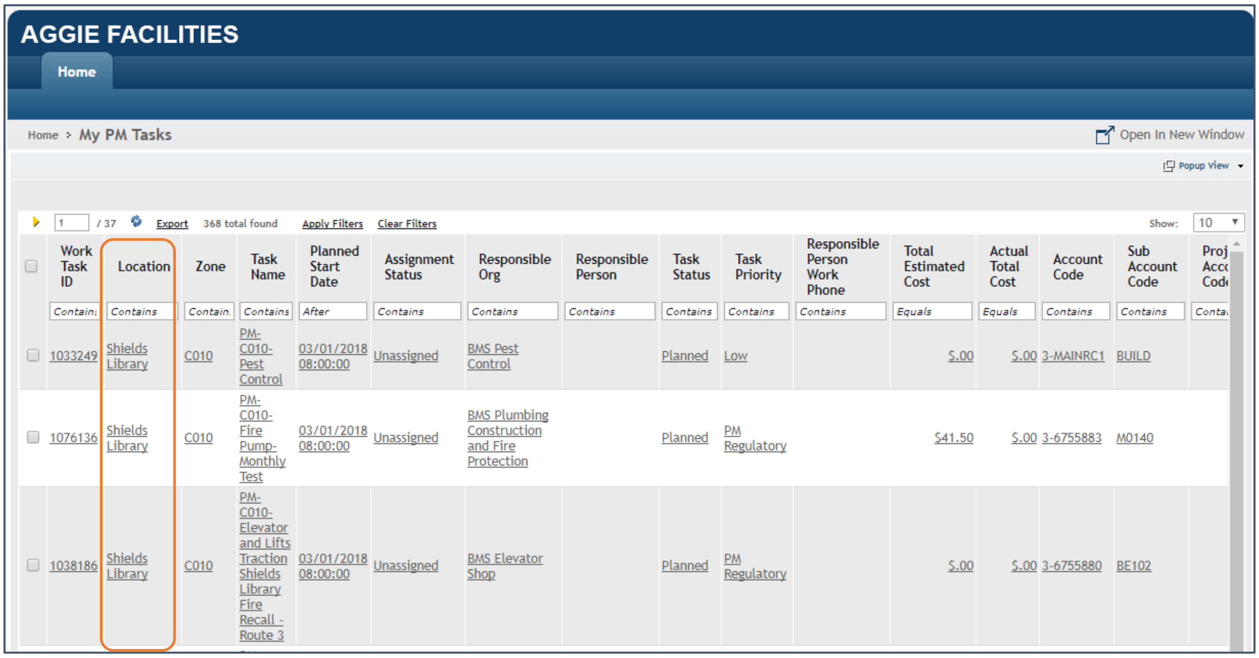

Once added there is an option to Remove tasks(s) from the watchlist as above.

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



## 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.

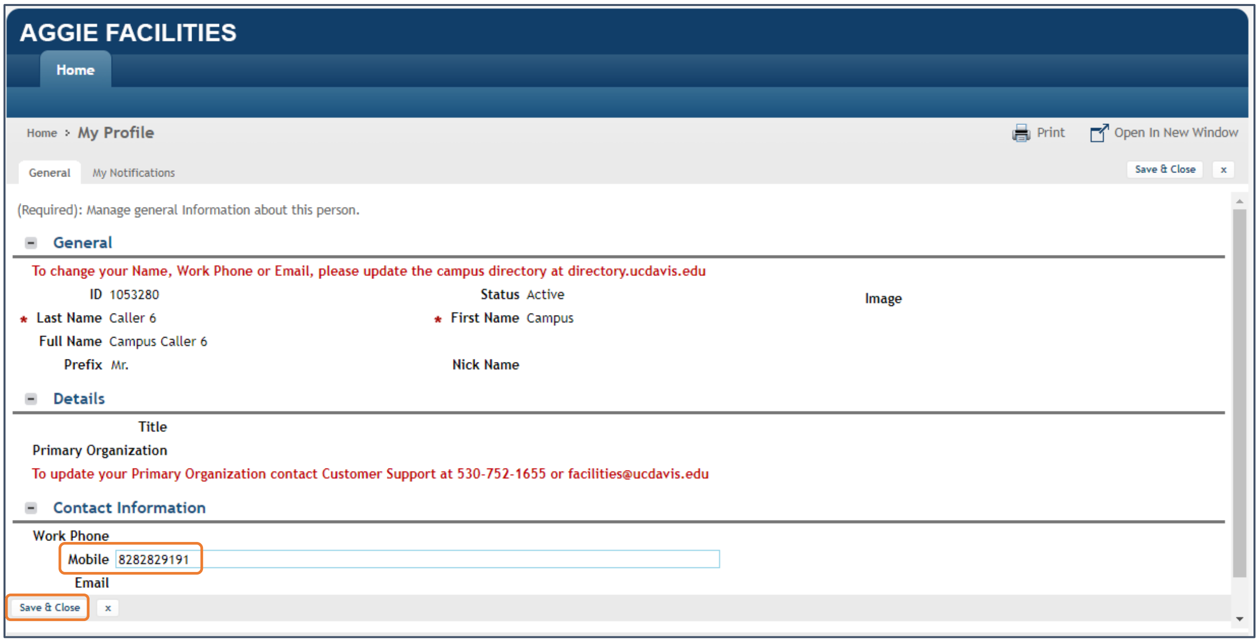



My PM History displays all completed work tasks for a building on the watchlist.

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




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.