



CREATE A REQUEST TO PERFORM ESTIMATED WORK

Provides guidance for creating a Service Request to complete Estimate Work in Facilities Connect.

▼ GETTING STARTED

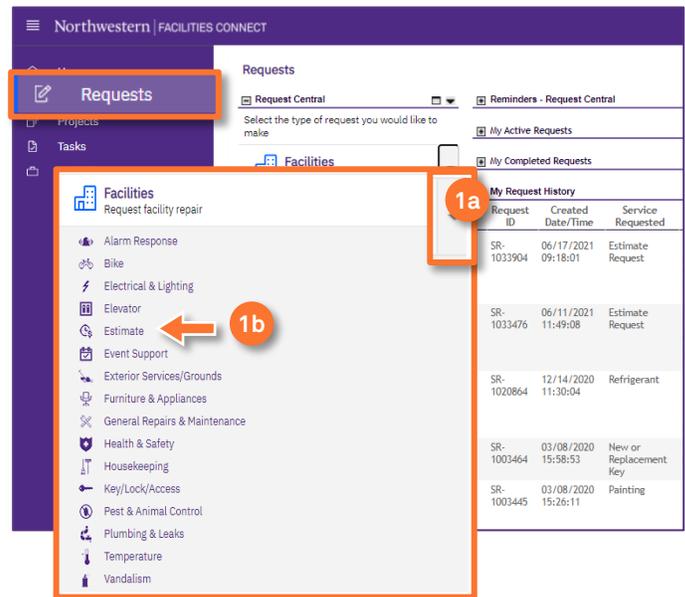
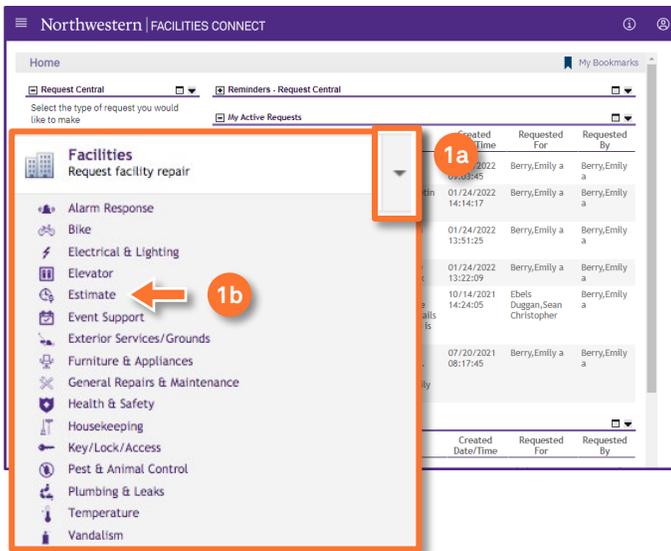
Once an **Estimate Request** has been completed by the appropriate parties, the **Estimate Request Form** will be returned to **Customer Service**. The **Customer Service Team** will then forward the completed form to the **Requestor**. Alternatively, the completed **Estimate** and associated form can be found on **Facilities Connect**.

If you do not wish to continue with completing the estimate work, simply save the completed form for your records. The completed form will be valid for **90 days** if you decide to have the work completed at a later date. Otherwise, another **Estimate Request** will be required.

DIRECTIONS:

1 For most Facilities Connect Users, **Request Central** will appear on the **Facilities Connect Home Screen**.

For Facilities Connect users with expanded Facilities Management responsibilities, **Request Central** will appear within the **Requests Tab**.



1a Ensure the toggle arrow is pointing down to reveal the available **Request Categories**.

1b Click on **Estimate**.



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DIRECTIONS:

2

Upon clicking the **Estimate Request Form** will appear. To complete the form, fill in the required fields.

The screenshot shows the 'Estimate' form in the Northwestern Facilities Connect system. The form includes a header with the system name and user information, a home button, and utility buttons for Print, Add to Bookmarks, and My Bookmarks. A 'Submit' button is located in the top right corner. Below the header, there is an instruction: '(Instruction): To submit an Estimate Request, complete the form below then click Submit.' The main section is titled 'Request Details' and contains several fields: 'Request is for' with radio buttons for 'Me' (selected) and 'Someone Else'; 'Building' (Kresge/Crowe Hall), 'Floor' (03), and 'Room' (03512) dropdown menus; 'Organization' (Northwestern) dropdown; 'Preferred Access Time' dropdown; and 'I need to be present during your visit?' with 'Yes' and 'No' radio buttons. Below this is a 'Billing Type' section, followed by a 'Service Request' section with a table of request types. The table has columns for 'Name' and 'Description'. The first row is 'Estimate Request' with the description 'Request an estimate. Please be specific in the request.' The second row is 'Perform Estimat...' with the description 'Perform estimated work. Please clearly identify estimate.' Below the table is a pagination control showing '1 - 2 of 2 items' and '1 of 1 pages'. The bottom section includes 'Describe Your Request (Required)', 'Other Locations', 'Comments', 'Related Documents', and 'Work Task' sections, each with 'Add' and 'Remove' buttons. A 'Submit' button is at the bottom left.

3

In the **Request is for** field:

3a

If the **Request** is for you click on the **Me** radio button.

This close-up screenshot focuses on the 'Request is for' field. It shows two radio buttons: 'Me' and 'Someone Else'. The 'Me' radio button is selected, indicated by a blue dot. A red arrow points to the 'Me' radio button, and a red circle with the number '3a' is next to it. The entire field is enclosed in a red rectangular box.



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DIRECTIONS:

3 *Optional:* if the **Request** is for **Someone Else**:

3b Click on the **Someone Else** radio button.

Upon clicking, the **Requested For** section will appear.

3c Fill in the details of the person you are creating the **Service Request** for.

4 In the **Request Details** section:

4a Click on the **Search** buttons and select a **Building**, **Floor**, and **Room**.

▼ INFORMATION

Building is the only required field for location. To ensure the **Estimate** is routed quickly add a **Floor** and **Room**. Be as specific as possible when entering to assist those completing the work.



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DIRECTIONS:

4 Request Details continued.

4b Click on the Preferred Access Time drop-down menu and select a timeframe.

4c Click on the Yes or No radio button to decide whether the Requestor needs to be present during the work.

* Building Abbott Hall
 Floor 03
 Room 00301
 Organization Z6ENG
 * Preferred Access Time ▼
 * I need to be present during your visit ?

Morning (00:00-11:59)
 Afternoon (12:00-16:59)
 Evening (17:00-23:59)
Anytime

4b

* Building Abbott Hall
 Floor 03
 Room 00301
 Organization Z6ENG
 * Preferred Access Time Anytime ▼
 * I need to be present during your visit ? Yes No

4c

5 In the Service Request section:

5 Click on the radio button for Perform Estimated Work.

Service Request
 Export 2 total found Show: 500

Name	Description
<input type="radio"/> Estimate Request	Request an estimate. Please be specific in the request.
<input checked="" type="radio"/> Perform Estimated Work	Perform estimated work. Please clearly identify estimate.

5

6 Upon clicking, the Request Chartstring(s) section will appear.

6a Click on the Add button.

Requested Chart String(s)
 0 total found

ID	Name	Description	Request Chart String	Chart String Status	Requested Percent
No data to display					

6a



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DIRECTIONS:

6 Continued. Upon clicking, the **Request Chart String** pop-up will appear.

6b Click on the **Find** button.

Request Chart String: [Print] [Help]

(General): Required [Create] [X]

General

ID	Status	
Request Chart String	Requested Percent 100	
Chart String Status	If you need to split the funding for this request, please contact Facilities Customer Service at 847-491-5201 (Evanston) or 312-503-8000 (Chicago).	
	Revenue Account Code 53506	
Name	Description	

[Create] [X]

Upon clicking, the **Search Chart String** pop-up will appear.

6c Use the search fields to locate the appropriate **Chartstring**.

6d Click on the **Radio** button for the **Chartstring** you wish to select.

6e Click on the **Ok** button.

Export 2 total found Apply Filters Clear Filters [OK] [Export] [Cancel] Show: 50

Chartstring	Fund Code	Dept ID	Project ID	Activity ID
110-1366050	Contains	Contains	Contains	Contains
<input checked="" type="radio"/> 110-1366050	110	1366050		
<input type="radio"/> 110-1366055	110	1366055		

7 Upon clicking, you will be returned to the **Estimate Request Form**. Next, in the **Describe Your Request (Required)** section:

7 Enter a detailed description of your **Estimate Work**.

Describe Your Request (Required)

I have an estimate for building a wall in my office. I want to have the work completed.



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DIRECTIONS:

8

In the **Related Documents** section:

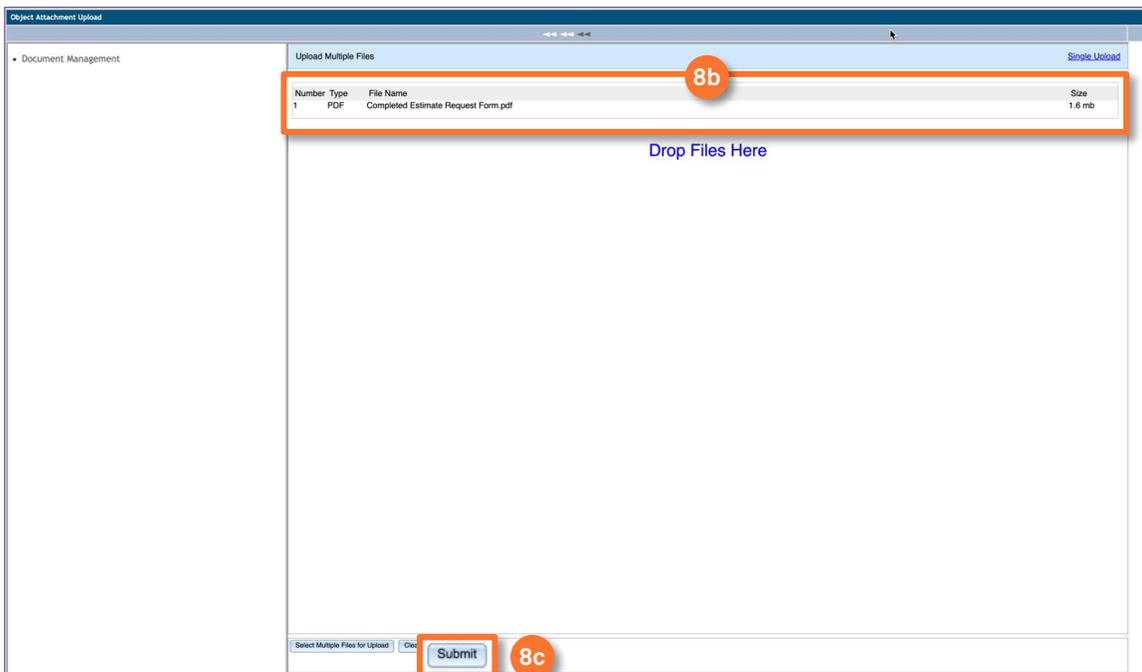
8a Click on the **Upload** button to add a copy of the completed **Estimate Request Form**.



Upon clicking, the **Object Attachment Upload** pop-up will appear.

8b Drag a drop the completed **Estimate Request Form**.

8c Click on the **Submit** button.





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DIRECTIONS:

9

Upon clicking, you will be returned to the **Estimate Request Form**. The added file will appear in the **Related Documents** section. Once all the required information is entered:

9

Click the **Submit** button (at either the top or bottom of the page).

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Estimate

(Instruction): To submit an Estimate Request, complete the form below then click Submit.

Request is for: Me Someone Else

Requested For

Net ID: _____

Name: Berry, Emily a

Work Phone: 847.491.3656

Email: bethany.tacoma@northwestern.edu



Related Documents

Document Name	Document Description
No data to display	

Items per page: 10 0 of 0 items

Work Task

Task ID	Task Name	Created Date	Description	Status	Total Time Log Hours
No data to display					

▼ INFORMATION

Once the **Request to Complete Estimate Work** is submitted, the **Request** will be received by **Customer Service**. Once they have reviewed and validated the **Request**, it will be routed to the appropriate shop to begin work.

If you need assistance in creating an **Estimate Request**, please contact **Facilities Customer Service** at 847-491-5201 (Evanston) or 312-503-8000 (Chicago).