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.

   ![Request Central on Home Screen]
   
   1a. Ensure the toggle arrow is pointing down to reveal the available Request Categories.
   
   1b. Click on Estimate.

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

   ![Request Central in 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:

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

2. In the **Request is for** field:
   - If the **Request** is for you click on the **Me** radio button.

3. Upon filling in the form, click the **Submit** button to submit the request.
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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.

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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.

4b

5 In the Service Request section:

5 Click on the radio button for Perform Estimated Work.

5

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

6a Click on the Add button.

6a
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**DIRECTIONS:**

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

1. **6b** Click on the **Find** button.

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

1. **6c** Use the search fields to locate the appropriate Chartstring.

1. **6d** Click on the **Radio** button for the Chartstring you wish to select.

1. **6e** Click on the **Ok** button.

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

1. **Enter a detailed description of your Estimate Work.**
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DIRECTIONS:

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:

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:

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

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).