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 in 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

**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**

- **Review – Step 5 of 5:**
  - Click the Back button on your web browser if changes are needed.
  - If information is correct click – **Finish**
• 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.

A list of your Service Requests will be displayed.

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