LBRE
Redesigned Work Request
Web Form

January 26th 2016
Agenda

• Reasons behind the redesign
• Demo – Desktop browser based
• Demo – iPad browser based
  – And how to create an icon on your home screen
• Go-live is February 1\textsuperscript{st} 2016
Reasons for the redesign

• Backend system upgrade
  – Deprecated API methodology for current form

• Opportunity to modernize
  – Form design and mechanics
  – Mobile enable

• Simplify based on customer + Zones + Work Support Services input
Demo – Desktop Browser Based

• BGM web site landing page

Welcome to Buildings and Grounds Maintenance

Buildings and Grounds Maintenance (BGM) is responsible for maintaining the academic buildings and grounds of the Stanford campus. If you don’t find what you are looking for on this site, please let us know.

Caretakers of a Legacy

Submit a Work Request
For an Immediate Facilities issue, call 723-2281
Emergency Information

Announcements

• Please note the following New email addresses:
  Custodial Services - custodial@stanford.edu
  Recycling/PSSI - recy-cling@stanford.edu
• Building System Planned Shutdown Notifications
• December 2015/January 2016 Newsletter
• Building Manager Meeting Presentations - 17th March, 2015
• Emergency Planning For Your Building

Quick Links

• Building Manager Application
• Work Requests
• Campus Construction Projects and Schedule
• Newsletter Archive
• Building Manager Training Archive
• Request Utilities & Systems Shutdown
Demo – Desktop Browser Based

• New work request landing page
Demo – Desktop Browser Based

- Redesigned Work Request form

- Simplify - minimize confusion
- Dynamically show/hide fields based on need
- Responsive design
Demo – Desktop Browser Based

<table>
<thead>
<tr>
<th>Requestor Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Phone</td>
</tr>
</tbody>
</table>

* I need
  - Select the work/service being requested:
    - a name plate made.
    - an estimate for a project.
    - custodial service.
    - garbage & recycling (PSSI).
    - keys duplicated.
    - lights changed.
    - mail & delivery service.
    - outdoor maintenance clean-up.
    - schedule service for an event.
    - some work done that I pay for.
    - someone to come and fix.
    - to request a building shutdown.

**Service Specific**

**Generic Customer Funded**

**Generic Facilities Funded**
Demo – Desktop Browser Based

- Example – Building/Room not listed

- [Building]
  - [Please Select Building]
- [Room]
  - [Please Select Room]
- [Title of Request]
  - Customer funded work request.
- [Description of Work]
- [Earliest Start Date]
- [Latest Completion Date]

You can describe the applicable location here

Default value based on “I need” selection

Add PTA Approval Route

No PTA Approval Records Found

Submit  Reset
Demo – Desktop Browser Based

- I need [some work done that I pay for.]
- Building:
  - Room [09-100 : 315 BONAIR SIDING]
  - [222]
- Title of Request [Customer funded work request. You can replace or append appropriate text here.]
  - Character count: 79 of 240
- Description of Work
- Earliest Start Date
- Latest Completion Date

Add PTA Approval Route

No PTA Approval Records Found

Submit Reset
Demo – Desktop Browser Based

- I need: some work done that I pay for.
- Building: 09-100 : 315 BONAIR SIDING
- Room: 222
- Title of Request: Customer funded work request. You can replace or append appropriate text here.
- Description of Work: Description of work content that you can type. Up to 1,000 characters.
- Earliest Start Date: 01-21-2016
- Latest Completion Date: 

Click the Calendar widget or type in the value; format is mm-dd-yyyy
Demo – Desktop Browser Based
• Adding a PTA approver route
Demo – Desktop Browser Based

Values for Task and Award are determined by the value of the Project field.
Demo – Desktop Browser Based

Add PTA Approval Route

- Route Order: 1
- Project: 1136494-Planning and Scheduling
- Task: 1-Plan & Schedule
- Award: ALAAJ-Facilities Overhead
- Approver: -Please Select Approver-

Values for approver are limited to those assigned to the PTA

No PTA Approval Records Found

Submit  Reset
Assign the PTA percentage then click Apply.

No PTA Approval Records Found
Demo – Desktop Browser Based

- Total of all PTA percentages must be 100
- Delete a PTA line
- Edit a PTA line

- And of course...click Submit when you're done
Demo – Desktop Browser Based

• Reports and Inquiry
  – Essentially the same as the legacy BGM work request format and contents

Tap to expose menu
Demo – Desktop Browser Based

• Reports and Inquiry - Request Status report

For the PTA approval assigned to you click the request
### Work Request Detail

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Number</td>
<td>3126145</td>
</tr>
<tr>
<td>Request Date</td>
<td>01-22-2016</td>
</tr>
<tr>
<td>Department</td>
<td>ZONES</td>
</tr>
<tr>
<td>Status</td>
<td>Open</td>
</tr>
<tr>
<td>Created By</td>
<td>Chang, Kenneth J. <a href="mailto:fss-wfm-for-dev@mailman.stanford.edu">fss-wfm-for-dev@mailman.stanford.edu</a></td>
</tr>
<tr>
<td>Requested For</td>
<td>Chang, Kenneth J. <a href="mailto:fss-wfm-for-dev@mailman.stanford.edu">fss-wfm-for-dev@mailman.stanford.edu</a></td>
</tr>
<tr>
<td>PTA(s)</td>
<td>1136494-1-ALAAJ-100%</td>
</tr>
<tr>
<td>Building</td>
<td>09-100</td>
</tr>
<tr>
<td>Building Name</td>
<td>315 BONAIR SIDING</td>
</tr>
<tr>
<td>Title of Request</td>
<td>Customer funded work request.</td>
</tr>
<tr>
<td>Description of Work</td>
<td>*** KJHCHANG (2016-01-22 10:38:21) ***</td>
</tr>
<tr>
<td></td>
<td>Customer funded work request.</td>
</tr>
<tr>
<td></td>
<td>*** KJHCHANG (2016-01-22 10:38:22) ***</td>
</tr>
<tr>
<td></td>
<td>Floor:</td>
</tr>
<tr>
<td></td>
<td>Room: 222</td>
</tr>
<tr>
<td>Start Date</td>
<td>01-25-2016</td>
</tr>
<tr>
<td>Due Date</td>
<td>01-29-2016</td>
</tr>
<tr>
<td>Completion Date</td>
<td></td>
</tr>
<tr>
<td>For Approval Routing</td>
<td>Please click</td>
</tr>
</tbody>
</table>

### This Request Was Routed To:

<table>
<thead>
<tr>
<th>Name</th>
<th>Route Type</th>
<th>Route Sent</th>
<th>Routing Status</th>
<th>Response Or Action</th>
<th>Action Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chang, Kenneth</td>
<td>Originator Notification</td>
<td>01-22-2016</td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chang, Kenneth</td>
<td>Approver Notification</td>
<td>01-22-2016</td>
<td>Notified</td>
<td>Pending Approval</td>
<td>01-22-2016</td>
</tr>
</tbody>
</table>

### Summary of Charges

<table>
<thead>
<tr>
<th>Operation</th>
<th>Department</th>
<th>Description</th>
<th>Labor</th>
<th>Material &amp; Invoices</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**NOTE:** Amount Total is displayed in the last page set of the reports.
Demo – Desktop Browser Based
• EAM is used to approve PTA’s

In the EAM Worklist area, click the Work Request link to go to the approval screen.
Demo – Desktop Browser Based

- Reports and Inquiry - Request Status report

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Buildings and Ground Maintenance Requests Approval for Work Requests

Requestor: Chang, Kenneth J.
Requestor Contact: (650) 724-5324, fss-wfm-for-dev@mailman.stanford.edu
Work Request: 3126145
Description: Customer funded work request.
Location: 09-100
Account Number: 1136494.1-ALAAJ 100%

View Request: [Click Here to View 3126145]

If you need to login to Oracle first, then [click here] to log in.

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Action History

<table>
<thead>
<tr>
<th>Num</th>
<th>Action Date</th>
<th>Action</th>
<th>From</th>
<th>To</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>22-JAN-2016 10:45:21</td>
<td>Submit</td>
<td>SYSADMIN</td>
<td>Chang, Kenneth</td>
<td></td>
</tr>
</tbody>
</table>
Demo – iOS Mobile Based

• iPad and iPhone (Fac Funded example)
Demo – iOS Mobile Based

- iPad and iPhone (Cust Funded example)
Demo – iPhone/iPad icon shortcut

• In Safari use to the new work request URL
  – workreq.stanford.edu (available 2/1/2016) or

• Tap Go
Demo – iPhone/iPad icon shortcut

• After 2-step authentication top the Forward icon
Demo – iPhone/iPad icon shortcut

• Select the Add to Home Screen option
Demo – iPhone/iPad icon shortcut

• Et voila!