## **HVAC After-Hours Request How-To Guide for End Users**

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For assistance with the new HVAC Request system, please contact the Management Information Services department at 407-0189 or via email: cnewco@neisd.net

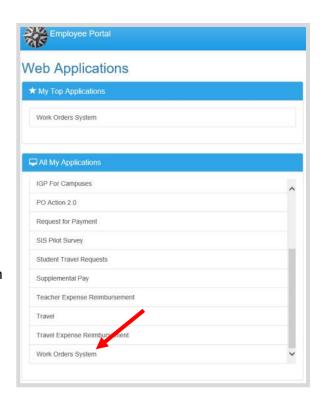
# **HVAC After-Hours Request How-To Guide for End Users**

After hours heating and cooling requests will now be submitted through the Work Order Application in Employee Portal.

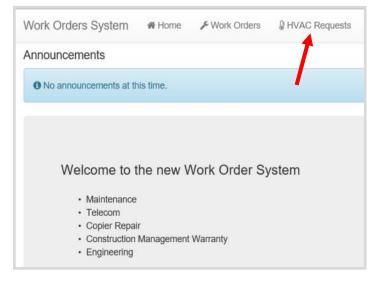
#### Accessing the HVAC Request System

Log into Employee Portal.

 Select "Work Order System" from your application list (it is last on the list—you may have to scroll down)

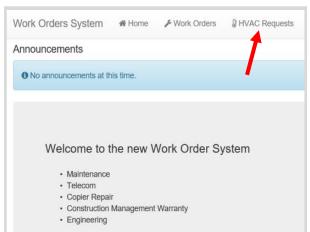


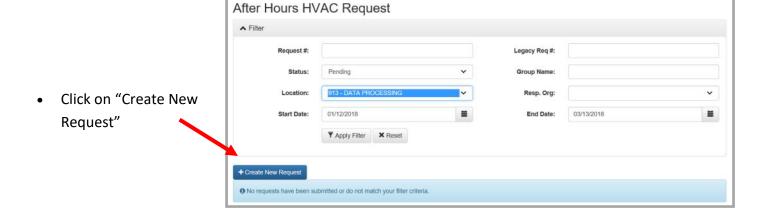
 Click on "HVAC Requests" at the top of the Work Order Home page.



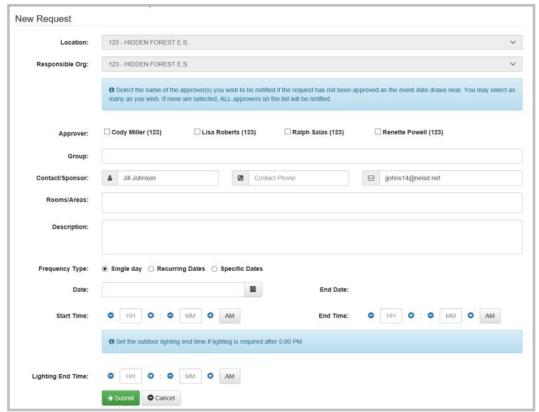
#### Entering A New After Hours HVAC Request—SINGLE DAY REQUEST

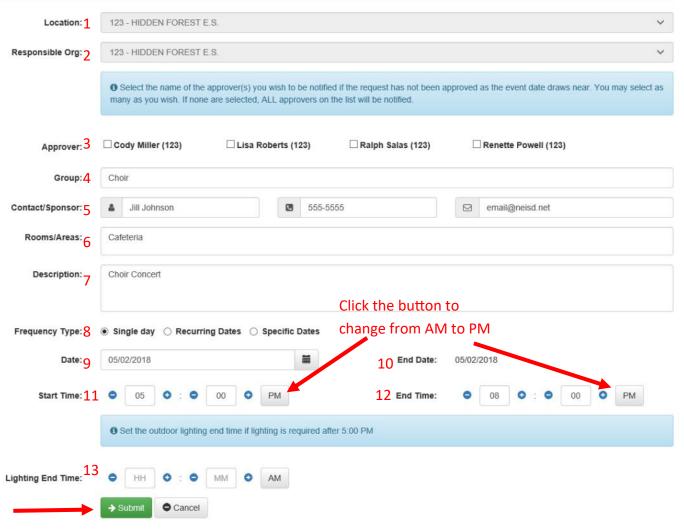
 Click on "HVAC Requests" at the top of the Work Order Home page.





 A new request page will open

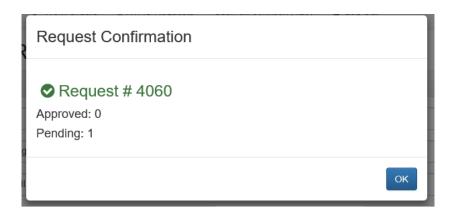




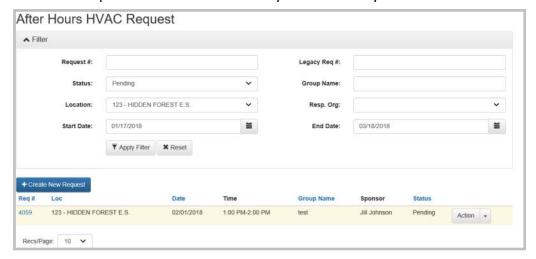
- 1. Choose the location where the After Hours HVAC is needed.
- 2. Choose the org/campus responsible for the cost of the After Hours HVAC request.
- 3. Choose an approver for this request. If no approver is selected, all approvers will be notified when the event date is within the next 60 days.
- 4. Indicate the Group that needs the HVAC after hours (e.g. Band, Choir, etc.)
- 5. Indicate the contact for this request. You can change the populated name and email. You will be required to input a phone number.
- 6. Indicate the room(s) and/or area(s) that need the HVAC after hours (e.g. rm 101, Gym 1, etc.).
- 7. Optional field. Give a brief description of the event or further details if necessary.
- 8. Choose if this request is for a single day, recurring days, or specific dates. (For this example, we will use Single Day. Recurring and Specific days will be detailed later in this guide.)
- 9. Indicate the date when the After Hours HVAC is needed in mm/dd/yyyy format or choose from the calendar)
- 10. The end date for single day requests will be the same as the date in #9.
- 11. Indicate the start time for the HVAC request
- 12. Indicate the end time for the HVAC request.
- 13. If after hours outdoor lighting is also needed, indicate the END time for the lighting.

Click "Submit" when all fields are complete. (You will receive a message if there are errors or missing information in your request.)

You will see a pop-up with your request number when you have submitted your request successfully.

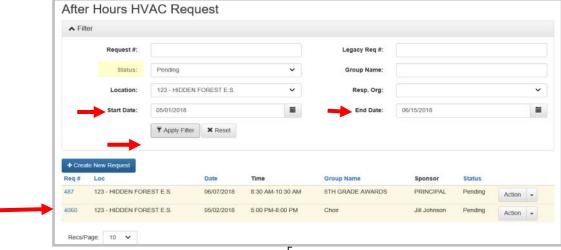


After your request is submitted, you will be redirected to your HVAC request home page. As you can see below, the request that was just submitted, #4060, does not show on the list of requests. This is because request #4060 takes place on 5/2/2018 and is outside of the 60-day window. By default, only requests that take place within the next 60 days will show in your list.



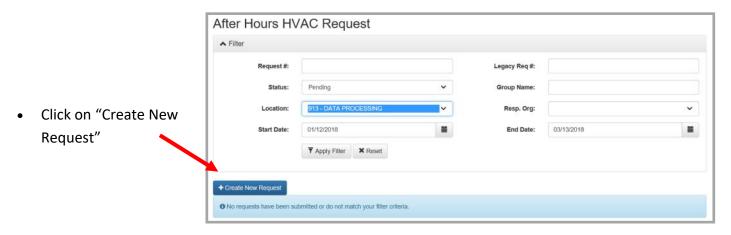
To view requests that are outside of the 60-day window, you will need to change the start and end dates on your filter and click "Apply Filter".

NOTE: ALL fields in your filter are dependent on each other. Therefore, if you are trying to find an Approved request, you will have to change the status filter to "Approved" or "-All-" for that request to show on your list.

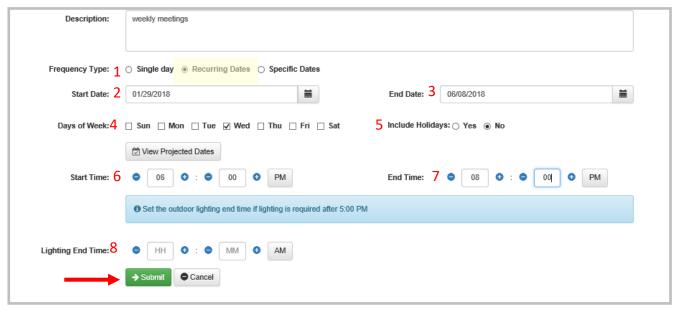


#### Entering A New After Hours HVAC Request—RECURRING DATES

Requests for events that occur on recurring days (e.g. Wednesday every week) can be scheduled using the "Recurring Dates" feature.

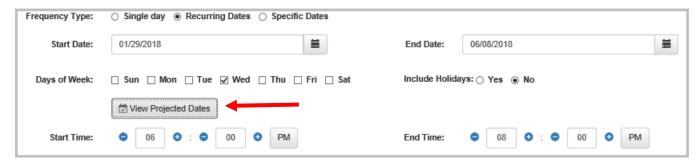


Enter information the same as you would for a "Single Day" request (pgs. 2-3) for location, responsible org, approver, group, contact/sponsor, rooms/areas, and description.

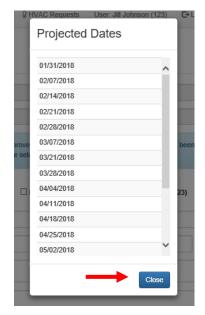


- 1. Frequency type: select "Recurring Dates".
- 2. Select the starting date for the series of events.
- 3. Select the end date for the series of events.
- 4. Select the day(s) of the week the events will occur.
- 5. Indicate if the event should take place on holidays.
- 6. Indicate the start time for each event
- 7. Indicate the end time for each event.
- 8. If after hours OUTDOOR lighting is also needed, indicate the END time for the lighting.

To review the dates of your recurring dates request before submitting, click on the "View Projected Dates" button.



A pop-up box will appear listing all the dates that you are about to schedule.

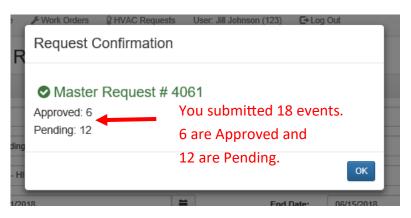


Click "Close" to exit the pop-up.

Click "Submit" when all fields are complete. (You will receive a message if there are errors or missing information in your request.)

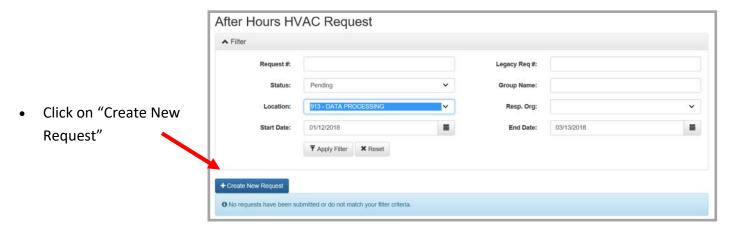


You will see a pop-up with your request number when you have submitted your request successfully.

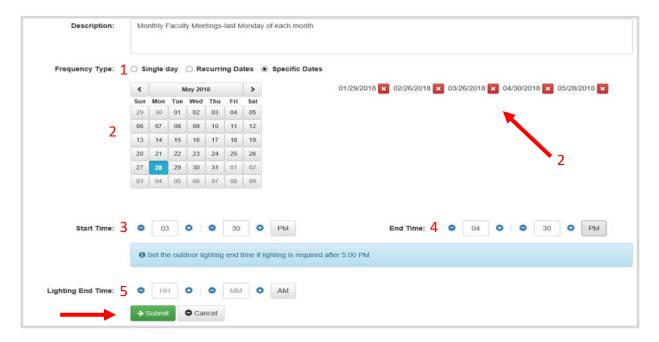


#### Entering A New After Hours HVAC Request—SPECIFIC DATES

Requests for events that occur on recurring days but not necessarily every week or the same day every month can be scheduled using the "Specific Dates" feature.



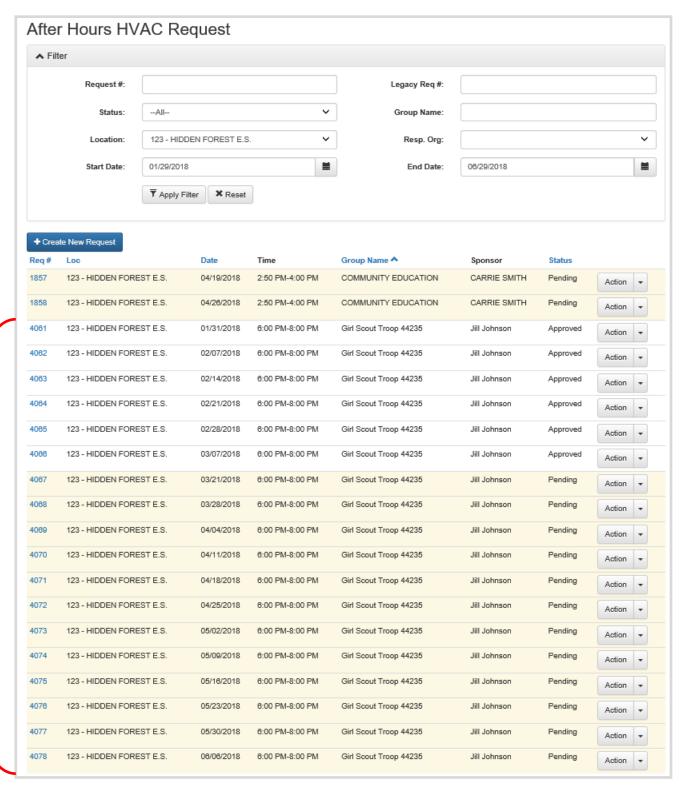
Enter information the same as you would for a "Single Day" request (pgs. 2-3) for location, responsible org, approver, group, contact/sponsor, rooms/areas, and description.



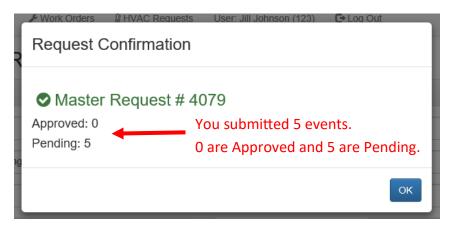
- 1. Frequency type: select "Specific Dates".
- 2. Select dates on the calendar by clicking on the specific dates you want to add to this event. Use the arrow buttons on the calendar to move through months. As you add dates they will show up in a list to the right. To delete a date, click the Red "x" next to the date.
- 3. Indicate the start time for each event
- 4. Indicate the end time for each event.
- 5. If after hours OUTDOOR lighting is also needed, indicate the END time for the lighting.

Click "Submit" when all fields are complete. (You will receive a message if there are errors or missing information in your request.)

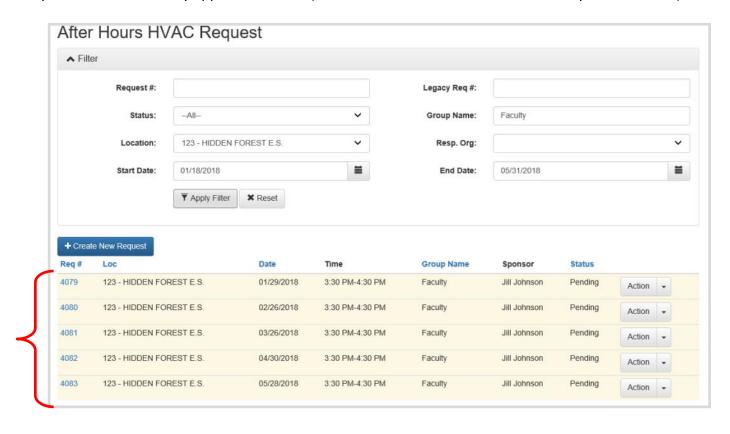
On the After Hours HVAC Request Home Page, you can see your requests for this recurring dates submission. As seen below, each date is given its own unique request number. Events will be sent to the approver when they are within the 60-day approval window (i.e. when the date is no more than 60 days in the future).



You will see a pop-up with your request number when you have submitted your request successfully.



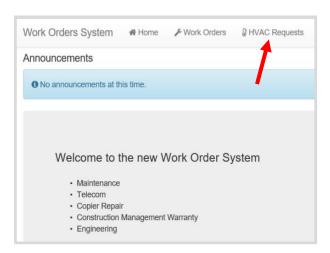
On the After Hours HVAC Request Home Page, you can see your requests for this recurring dates submission. As seen below, each date is given its own unique request number. Events will be sent to the approver when they are within the 60-day approval window (i.e. when the date is no more than 60 days in the future).



\*\*NOTE\*\*: On <u>All</u> After Hours HVAC requests—if you are an HVAC request <u>approver</u> for the org/campus listed as the "responsible org", any requests you submit will be automatically approved.

#### **Approving After Hours HVAC requests**

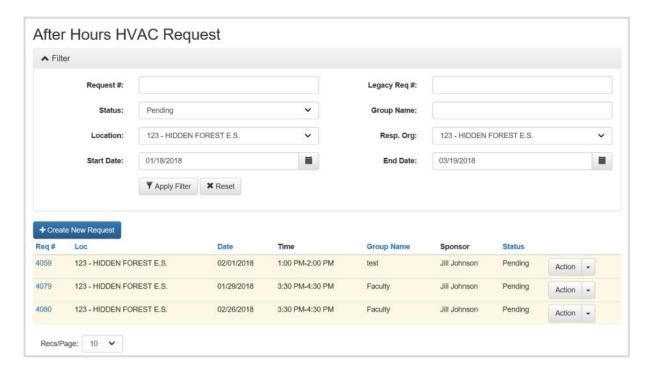
 Click on "HVAC Requests" at the top of the Work Order Home page.



Below is your After Hours HVAC Request Home Page.

Pay close attention to how your filters are set. By default, status will be "pending", location will be your campus, and resp. org will be blank. To see only requests you can approve, change your resp. org (as shown in the example below) and click "Apply Filter". (If you are an approver for more than one org/campus, you will have more than one selection to choose from.)

Also note that the dates that appear will only include the next 60 days. If you are looking for a request outside of those dates, be sure to change your dates and "Apply Filter" to see the request.



There are two options to approve a request. You can approve from the HVAC home page, or your can approve from the Detail View of the request.

To approve from the HVAC home page, use the "Action" drop-down menu by clicking on the arrow. Choose "Approve" to approve the request.

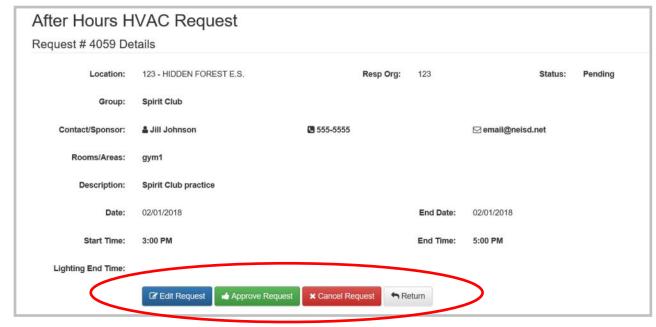


To approve from the Detail View, click on either the request number on the left, or chose Details from the Action drop-down menu.

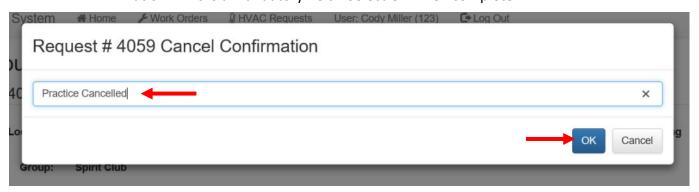


Once in Detail View, you can see all the details of the request.

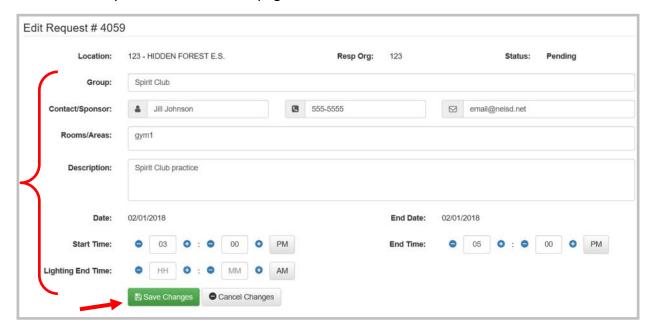
You can choose to Edit the request, Approve the request, Cancel the request, or Return to the list by using the corresponding button at the bottom of the page.



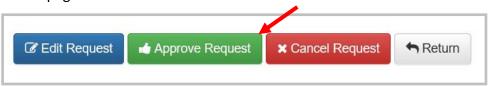
To Cancel a request, click the "Cancel Request" button at the bottom of the detail page. If you choose to Cancel the request, you must enter a reason for the cancellation. This is a mandatory field. Select OK when complete.



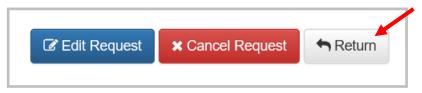
To Edit a request before approving, click the Edit button at the bottom of the detail page. Make the necessary changes and then click "Save Changes". This will take you back to the detail page.



To Approve the request, click the green "Approve Request" button at the bottom of the detail page.



After approving, click "Return" to be returned to the list on the HVAC home page.



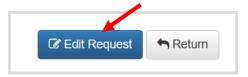
#### Editing an After Hours HVAC Request

Requests can be edited when they are in a "Pending" or "Approved" status.

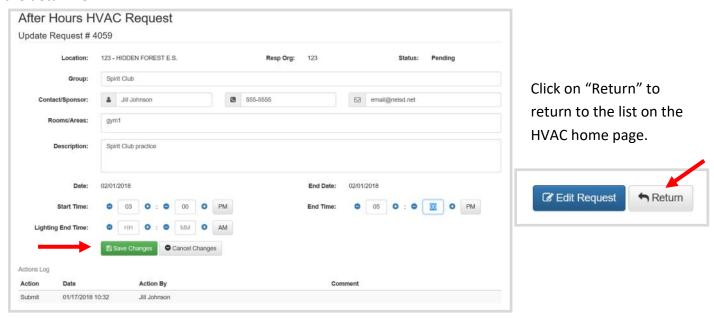
To edit a request: From your HVAC Request Home Screen, Use the Action drop-down box to choose "Details". This will open the Detail View of the request.



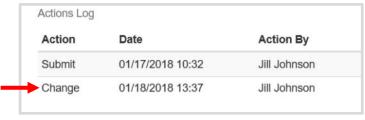
Once in the Detail View, Click on the blue "Edit Request" button at the bottom of the page.



Make the necessary changes to the request. You cannot edit the location, responsible org, or start/end dates. When you have made all the changes, click on "Save Changes" to save your changes and return to the detail view.



The next time the request is opened the Action Log at the bottom of the request will show that a change was made and which user made the change..



#### **Duplicating an After Hours HVAC Request**

You can duplicate a previous request by choosing duplicate from the Action drop-down box.



The location, resp. org, approver, group, contact/sponsor, room/areas, and description fields will pre-fill with information from the request you are duplicating.

You will need to complete the frequency type, start/end date, start/end time, and lighting end time (if applicable).

Click Submit when you have completed all fields to submit the request and get a request number.

