

Facilities Project Request Form – Client User Instructions

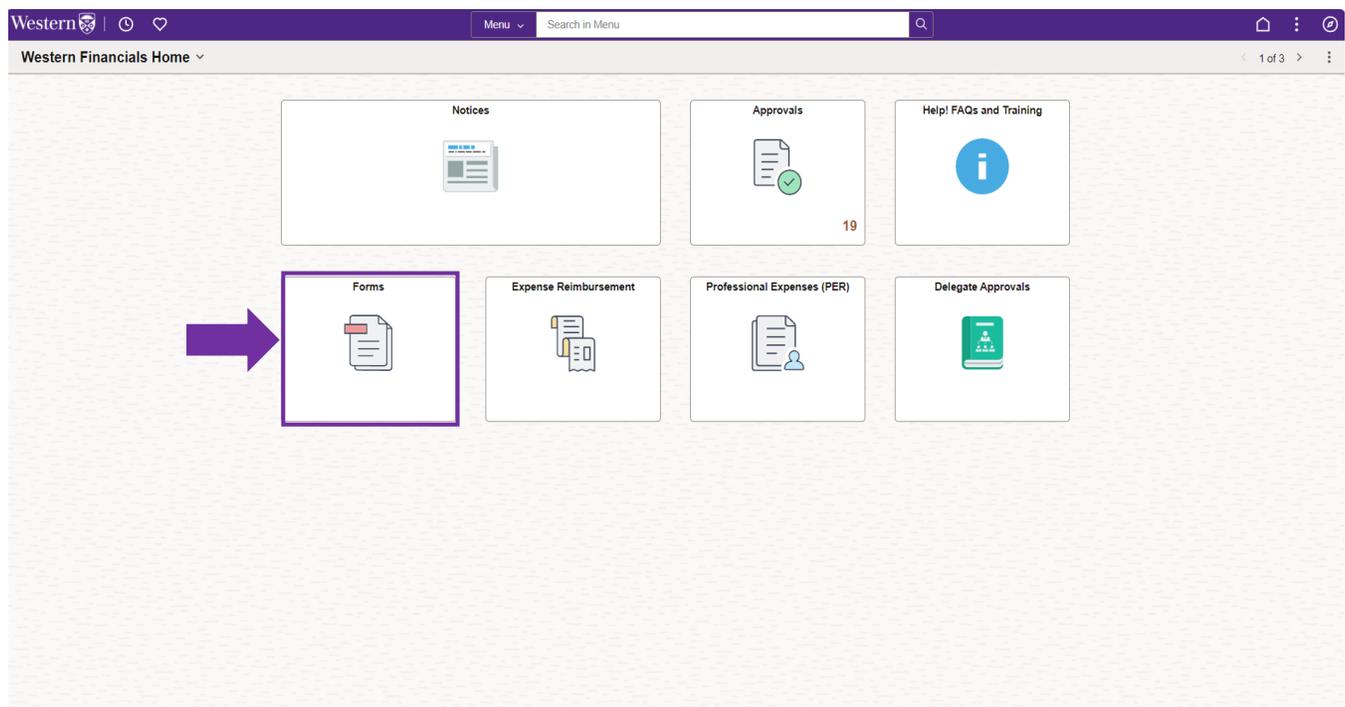
The form enables the capital project request process. There are three request types:

- 1.Scope & budget:** request for detailed scope and budget for a new project funded by a faculty/department/grant.
- 2.Furnishings:** request furnishings/fixtures funded by a faculty/department/grant.
- 3.Recommendations:** submit a recommendation for consideration for campus improvements.

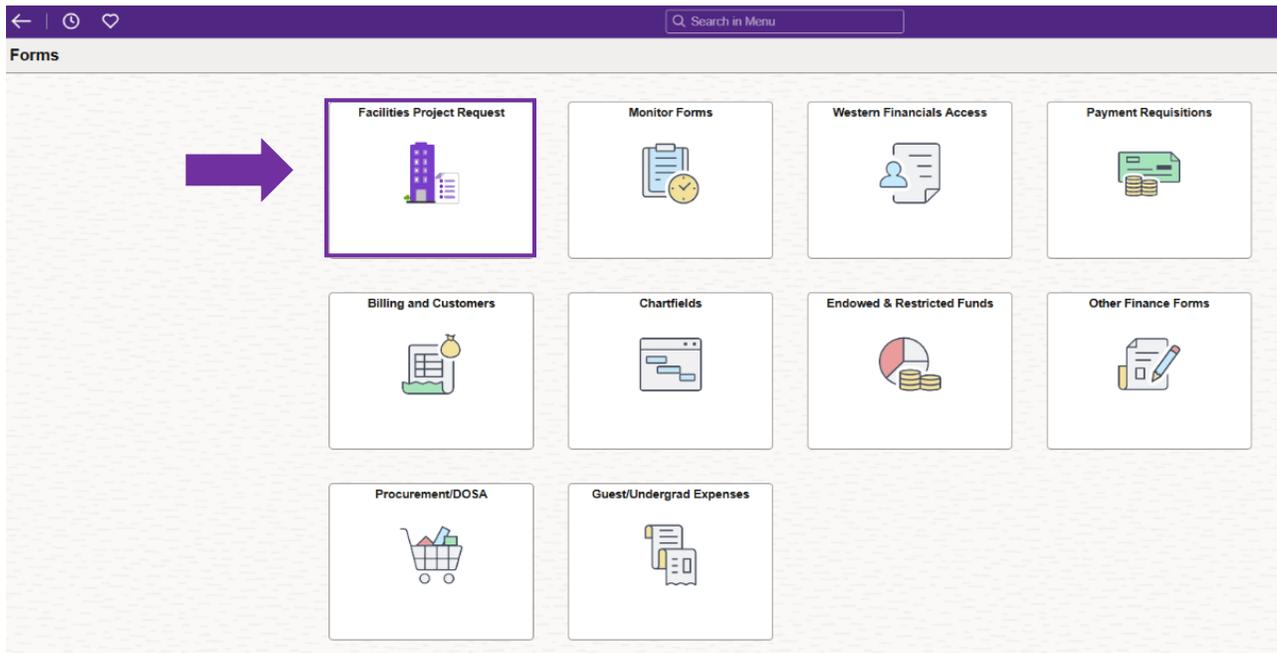
Submit a Project Request - Client

Step 1.) Access Facilities Forms

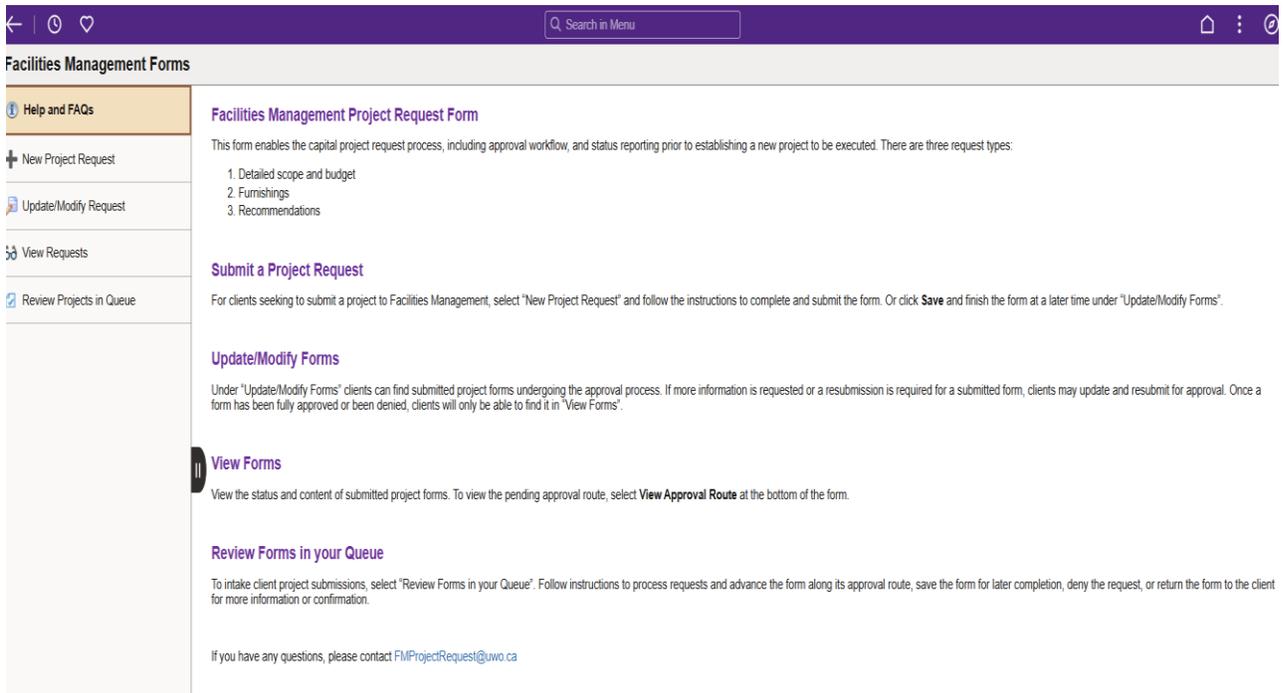
- a) Clients can go to <https://finance.uwo.ca> and locate Facilities Management project request forms by first selecting “Forms” under Western Financials Home.



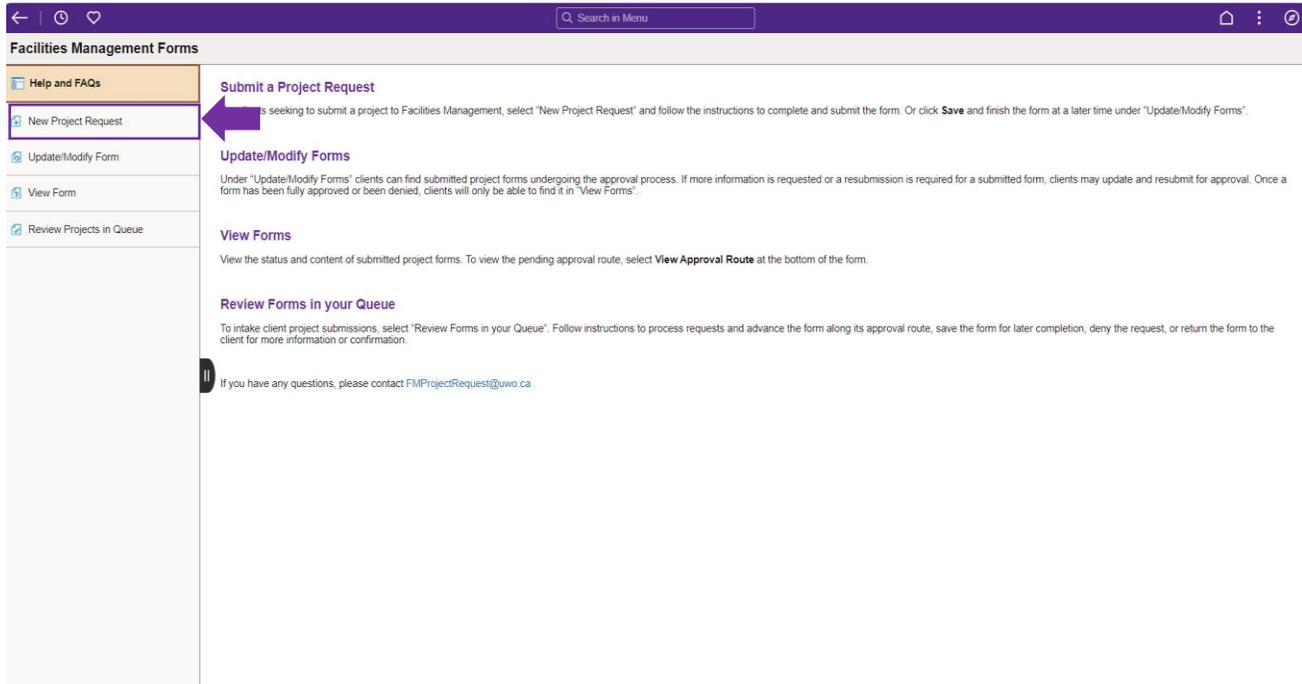
b) Clients can then navigate to “Facilities Project Request”.



c) “Facilities Management Forms” will open the main project submission navigation page shown below:



Step 2.) Begin Project Request



Please select “New Project Request” to submit a project to Facilities Management.

Please use the form to request a project. Once the request has been received, it will be reviewed, and you will receive an email notification regarding the status of your request. Incomplete forms will be returned. Please note, response times vary based on request volume and seasonal factors.

Priority will be given to requests involving capital funding, grant deadlines and strategic priorities. Please plan ahead by considering project factors such as design, consulting, lead times, procurement, budget and leadership approvals. Provide detailed information for accurate processing.

Should you have any questions, please contact FMProjectRequest@uwo.ca

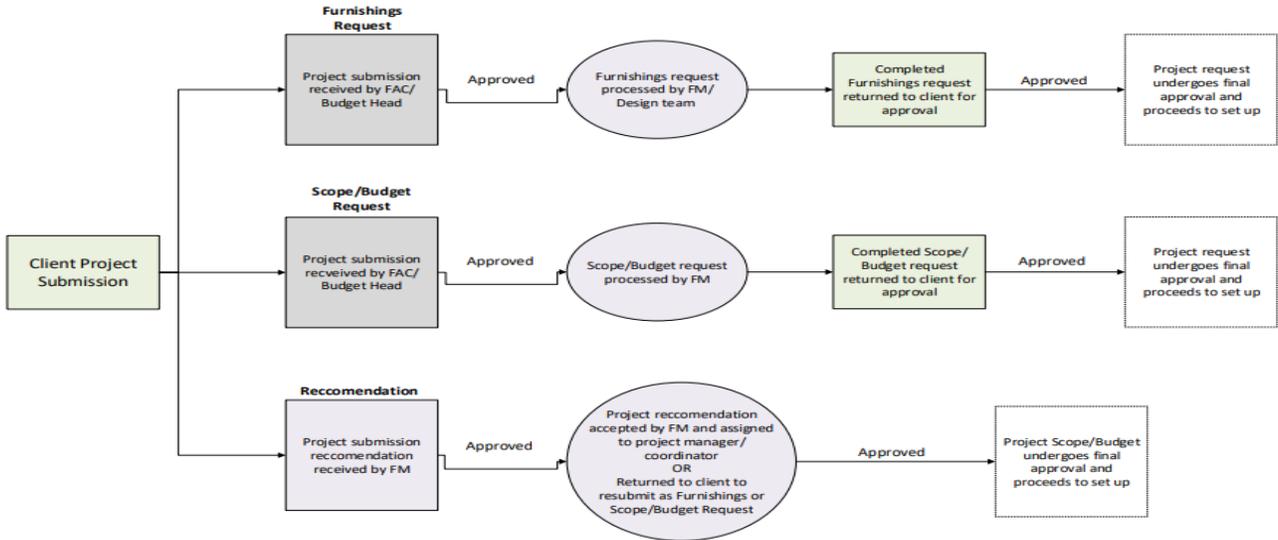
Step 3.) Enter Project Details

a.) Project Details:

There are three following project request types available, as defined above:

- Scope and Budget:
- Furnishings:
- Recommendation:

Different forms will proceed as outlined:



Snapshot of the Form:

Project Details

FM Request Type

Scope and Budget: Request scope and budget for a new project funded by a faculty/department/grant.

Furnishings: Request furnishings/fixtures funded by a faculty/department/grant.

Recommendation: Submit a recommendation for consideration for campus improvements.

*FM Request Type

Project Title

*Space Category

Are you already working with FM staff on this request?

Please detail the scope of work in the **Project Description** section below (maximum 254 characters).

Please also attach plans, sketches, equipment information, and any other supporting documentation in the **Attachments** section at the bottom of the form.

*Project Description

Additional Details per FM

i) Please choose the FM Request type, enter Project Title, space category and additionally enter information such as building and room number(s).

*Space Category → *Building *Room Number(s)

ii) Select from drop down options for advanced Building selection.

iii) If the client is already working with an FM Employee, please select 'Yes' and choose the employee's name from the lookup table.

Are you already working with FM staff on this request?

FM Contact

Cancel
Lookup

Search for: FM Contact

▼ Search Criteria

Value

Description

▼ Search Results

95 rows

| Value ↑↓ | Description ↑↓ |
|----------|------------------|
| ABETTRI | Amanda Bettridge |
| ANIEMI2 | Allan Niemi |
| BAPERTOU | Boris A Pertout |
| BDEJONG8 | Brandon Dejong |
| BDNOYES | Brian D Noyes |
| BHOSANG | Brent Hosang |
| BLOOTSM | Bryan Lootsma |

iv) Please detail project and scope of work to the best of your ability in the Project Description field.

Please detail the scope of work in the **Project Description** section below (maximum 254 characters).

Please also attach plans, sketches, equipment information, and any other supporting documentation in the **Attachments** section at the bottom of the form.

*Project Description

What are you looking to do?

Additional Details per FM

The Additional Details section has been greyed out, as it is intended to be completed only by project managers as the form progresses through the approval process.

Examples below:

Project Details

FM Request Type

Scope and Budget: Request scope and budget for a new project funded by a faculty/department/grant.

Furnishings: Request furnishings/fixtures funded by a faculty/department/grant.

Recommendation: Submit a recommendation for consideration for campus improvements.

*FM Request Type

Project Title

*Space Category

*Building

*Room Number(s)

Are you already working with FM staff on this request?

*FM Contact

Please detail the scope of work in the **Project Description** section below (maximum 254 characters).

Please also attach plans, sketches, equipment information, and any other supporting documentation in the **Attachments** section at the bottom of the form.

*Project Description

Additional Details per FM

b.) Funding Source (only for Scope/Budget and Furnishings Requests)

Funding Source and Accounting Information

Funding Source

Department/Unit - funded by department or unit budget

Grant - funded by an existing grant or grant proposal

Capital - funding requested from annual capital plan (assessed each February)

Funding Available is required if the Funding Source is Department/Unit but may not be applicable for Grant/Capital.

Department will be used to route the form for approval based on delegation of signing authority.

SpeedCode/Account enter defaults for FM project charge back (can be updated later).

*Proposed Funding Source

Funding Available for Project

Department (DoSA Routing)

Please select the project's funding source from these 3 options:

- Department/Unit: Funded by department or unit budget.
- Grant: Funded by an existing grant or grant proposal.
- Capital: Funding requested from annual capital plan (assessed each February).

Funding Available for Project: Please enter funds available to manage and evaluate expectations.

Additional funding prompts will appear:

*Proposed Funding Source

*Funding Available for Project

*Department (DoSA Routing)

Default SpeedCode (may be updated)

SpeedCode Full Chartfields

*Default Account (may be updated) Alterations

SpeedCode and Account: Please enter department SpeedCode and account in order to route for unit approvals in the initiation process. Once the scope and budgeting has been provided, a final approval will be required which provides the option to confirm or update funding sources. Select looking glass icon for advanced field selection.

Example below:

Funding Source and Accounting Information

Funding Source

Department/Unit - funded by department or unit budget

Grant - funded by an existing grant or grant proposal

Capital - funding requested from annual capital plan (assessed each February)

Funding Available is required if the Funding Source is Department/Unit but may not be applicable for Grant/Capital.

Department will be used to route the form for approval based on delegation of signing authority.

SpeedCode/Account enter defaults for FM project charge back (can be updated later).

*Proposed Funding Source

*Funding Available for Project

*Department (DoSA Routing) FM-Business Operations

*Default SpeedCode (may be updated)

SpeedCode Full Chartfields Fund 9 - Department 999999 - Program/Project 999999999999 --- Default-

*Default Account (may be updated) Alterations

c.) Faculty/Department/Unit Client Information

Please enter the requested contact/client information

Example below:

Faculty/Department/Unit Client Information

*Project Contact

*Email

*Telephone

Extension

*Faculty/Unit

d.) Strategic Priorities

Strategic Priorities

If applicable, please select the Strategic Priority that this project will support. For information about Western's Strategic Plan, please visit <https://strategicplan.uwo.ca/>

Primary Strategic Priority

Enter how this project relates to Western’s Strategic Priorities, if applicable.

For example:

Strategic Priorities

If applicable, please select the Strategic Priority that this project will support. For information about Western's Strategic Plan, please visit <https://strategicplan.uwo.ca/>

Primary Strategic Priority

People, Community, Culture

Briefly describe how this project supports Strategic Priorities

e.) File Attachments

File Attachments

| Status | Upload | Description ¹ | File Name ¹ | Delete |
|--------|---------------------------------------|--------------------------|------------------------|---------------------------------------|
| 1 | <input type="button" value="Upload"/> | <input type="text"/> | | <input type="button" value="Delete"/> |

Please submit any documentation for consideration. Examples include equipment specifications, layouts, quotes, photos, and capital budget submissions.

f.) Comments

Please add any information that pertains to the request.

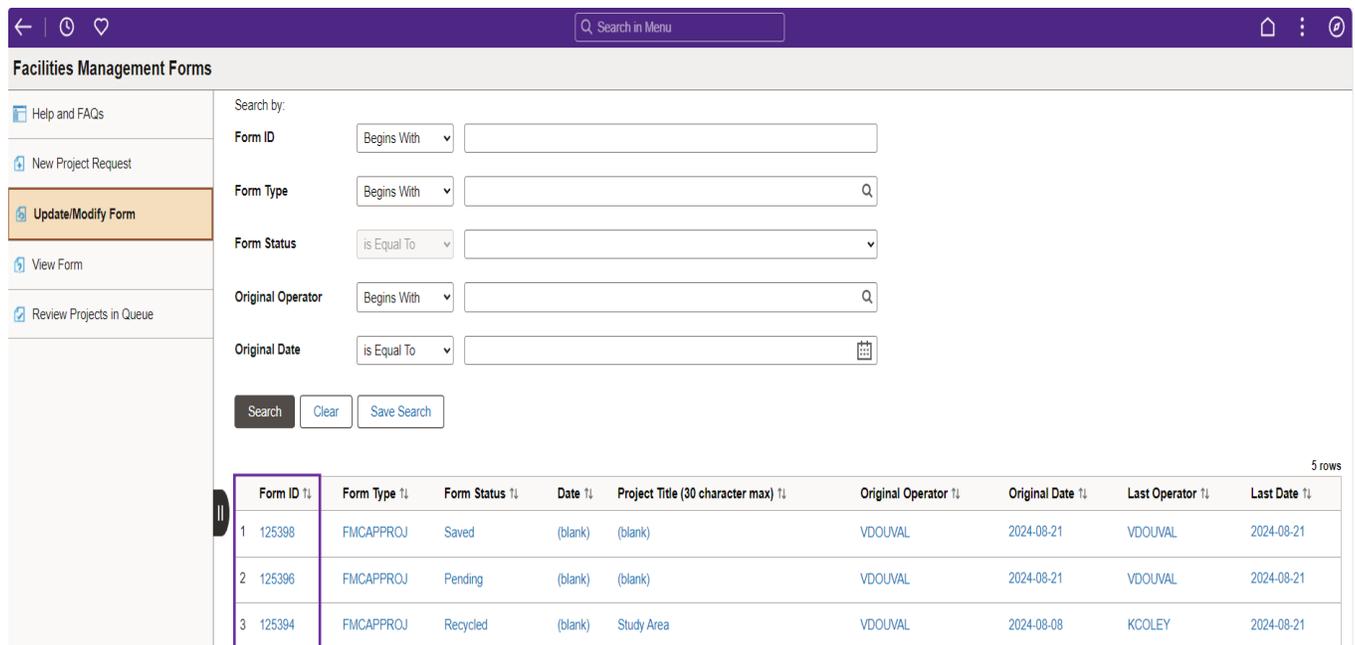
Comments

Step 4.) Save/Submit Form

Client users may submit the form to proceed it to the first stage of approval. Otherwise, save the form to continue working on it later. Please ensure to save the form if working on it for an extended period or form session may time out and changes will be lost.

Client users receive an email notification after form submission.

Saved forms can be found in the “Update/Modify Form” tab and can continue to be edited until submitted.



The screenshot shows the 'Facilities Management Forms' interface. On the left is a navigation menu with options: 'Help and FAQs', 'New Project Request', 'Update/Modify Form' (highlighted), 'View Form', and 'Review Projects in Queue'. The main area contains search filters for Form ID, Form Type, Form Status, Original Operator, and Original Date. Below the filters are 'Search', 'Clear', and 'Save Search' buttons. A table displays 5 rows of form data:

| | Form ID ↑↓ | Form Type ↑↓ | Form Status ↑↓ | Date ↑↓ | Project Title (30 character max) ↑↓ | Original Operator ↑↓ | Original Date ↑↓ | Last Operator ↑↓ | Last Date ↑↓ |
|---|------------|--------------|----------------|---------|-------------------------------------|----------------------|------------------|------------------|--------------|
| 1 | 125398 | FMCAPPROJ | Saved | (blank) | (blank) | VDOLVAL | 2024-08-21 | VDOLVAL | 2024-08-21 |
| 2 | 125396 | FMCAPPROJ | Pending | (blank) | (blank) | VDOLVAL | 2024-08-21 | VDOLVAL | 2024-08-21 |
| 3 | 125394 | FMCAPPROJ | Recycled | (blank) | Study Area | VDOLVAL | 2024-08-08 | KCOLEY | 2024-08-21 |

Forms will later be assigned a title after initial stages of approval but until then they are identifiable by a unique form ID present at the top right corner of the form.

Facilities Management Forms

+ Request : New Project

Form ID 134397 (NEW)

Project Details

FM Request Type

Scope and Budget: Request scope and budget for a new project funded by a faculty/department/grant.

Furnishings: Request furnishings/fixtures funded by a faculty/department/grant.

Recommendation: Submit a recommendation for consideration for campus improvements.

*FM Request Type

*Space Category

*Building

*Room Number(s)

Are you already working with FM staff on this request?

Please detail the scope of work in the **Project Description** section below (maximum 254 characters).

Please also attach plans, sketches, equipment information, and any other supporting documentation in the **Attachments** section at the bottom of the form.

*Project Description

Additional Details per FM

Step 5.) Approval Status

The Status of Forms can be monitored under “Requests (View Only)” tab. Use Form ID to search for the form or just click on “Search” button to view all your forms. This is Read Only and you cannot modify anything here.

Facilities Management Forms

Help and FAQs

+ New Project Request

Update/Modify Request

Requests (View Only)

Review Projects in Queue

Search by:

Form ID

Form Type

Form Status

Faculty/Unit

FM Agent

Original Operator

Original Date

Search Clear Save Search

| | Form ID ¹ | Form Type ¹ | Form Status ¹ | Faculty/Unit ¹ | FM Agent ¹ | Project Title (30 character max) ¹ | Project ID ¹ | Original Operator ¹ | Original Date ¹ | Last Operator ¹ | Last Date ¹ |
|---|----------------------|------------------------|--------------------------|---------------------------|-----------------------|---|-------------------------|--------------------------------|----------------------------|----------------------------|------------------------|
| 1 | 134846 | FMCAPPROJ | Denied | 440000 | GACKLAND | EHR 567 Test for Approval | (blank) | TBANERJ2 | 2025-02-28 | TBANERJ2 | 2025-04-01 |
| 2 | 134763 | FMCAPPROJ | Pending | 440000 | GACKLAND | BIO 567 Renovation Test 9 | 9D5304 | TBANERJ2 | 2025-02-27 | MSFERRA | 2025-02-28 |
| 3 | 134179 | FMCAPPROJ | Withdrawn | 440000 | MZAMAN24 | (blank) | (blank) | TBANERJ2 | 2025-02-13 | TBANERJ2 | 2025-02-26 |

9 rows

1. Select the submitted form currently in the approval process.
2. Scroll to the end of the form.
3. Select “View Approval Route” to access location of form.

View Approval Route

Return to Search

Next Page

Cancel
View Approval Route
Done

Review/Edit Approvers

Project Approval

▼ G3FORM_ID=125396 Pending

Scope and Budget

| | |
|--|---|
| <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ⌵ Pending Kenneth Stark Coley Unit Pre-Approval 12/31/23 12:00 AM > </div> | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ✉ Not Routed Greg Ackland FM Review A (Coordinator) 12/31/23 12:00 AM > </div> |
| <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ✉ Not Routed Multiple Approvers FM Review B (Intake) 12/31/23 12:00 AM > </div> | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ✉ Not Routed George Qubty IPB Review 12/31/23 12:00 AM > </div> |
| <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ✉ Not Routed Greg Ackland Project Manager/Coordinator 12/31/23 12:00 AM > </div> | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ✉ Not Routed Vasiliki Douvalis Client 12/31/23 12:00 AM > </div> |
| <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ✉ Not Routed Multiple Approvers Final Unit Approver (DOSA) 12/31/23 12:00 AM > </div> | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> ✉ Not Routed Michael McLean Policy 2.15 Approver 12/31/23 12:00 AM > </div> |

The approval route will display the next pending approval stage and direction of form.

4. If the Client users wish to withdraw their requests at any stage of the process, they can do so by navigating to the “Update/Modify Request” option on the landing page.

Facilities Management Forms

- Help and FAQs
- + New Project Request
- Update/Modify Request**
- View Forms
- Review Forms in Queue

Facilities Management Project Request Form
 This form enables the capital project request process, including approval workflow, and status reporting prior to establishing a new project to be executed.

- Detailed scope and budget
- Furnishings
- Recommendations

Submit a Project Request
 For clients seeking to submit a project to Facilities Management, select "New Project Request" and follow the instructions to complete and submit the form.

Update/Modify Forms
 Under "Update/Modify Forms" clients can find submitted project forms undergoing the approval process. If more information is requested or a resubmit form has been fully approved or been denied, clients will only be able to find it in "View Forms".

View Forms
 View the status and content of submitted project forms. To view the pending approval route, select **View Approval Route** at the bottom of the form.

Review Forms in your Queue
 To intake client project submissions, select "Review Forms in your Queue". Follow instructions to process requests and advance the form along its approval process for more information or confirmation.

If you have any questions, please contact FMProjectRequest@uwo.ca

They should click on the form to open it, scroll to the bottom, and select the **"Cancel Request"** option. Alternatively, they can click on **"Resubmit"** after making appropriate changes if the Form was Denied.



Step 6.) Accept Scope and Budget/Modify Project Request

1. Once the Client receives an email notification confirming that the form has successfully passed through the approval process, they must use the link in the email to log in and navigate to "Review Projects in Queue," and select **Search** to find their submitted form.

Facilities Management Forms

Search by:

Form ID

Form Type

Form Status

Original Operator

Original Date

| Form ID ↑ | Form Type ↑ | Form Status ↑ | Date ↑ | Project Title (30 character max) ↑ | Original Operator ↑ | Original Date ↑ | Last Operator ↑ | Last Date ↑ |
|-----------|-------------|---------------|---------|------------------------------------|---------------------|-----------------|-----------------|-------------|
| 125394 | FMCAPPROJ | Pending | (blank) | Study Area | VDOUVAL | 2024-08-08 | MSFERRA | 2024-08-08 |

2. To proceed, the client should click on the form to open it and scroll down to the bottom of the page.

3. In the “File Attachment” section, they will be able to view any attachments uploaded by the approvers. To access these documents, click on the “View” button.

File Attachments

| Attachment Uploaded | View | Description ↑ | File Name ↑ | Delete |
|---------------------|-------------------------------------|-----------------|------------------------|---------------------------------------|
| 1 | <input type="button" value="View"/> | test attachment | Project_Setup_Form.pdf | <input type="button" value="Delete"/> |

4. The Client should carefully review the “Scope and Budget Decision.” “Scope and Budget Decision”

Scope and Budget Decision

*Decision

FM Initial Budget \$16,001.00

From the drop-down menu, they have two options: they can either accept the approved budget or request revisions to the budget.

*Decision

FM Initial Budget

- Accept Scope and Budget
- Revise Request

If the client accepts the budget, they must acknowledge this decision by signing off in the “Acknowledgement” section.

Scope and Budget Decision

*Decision

FM Initial Budget \$16,001.00

File Attachments

| Attachment Uploaded | View | Description ↑↓ | File Name ↑↓ |
|---------------------|----------------------|-----------------|------------------------|
| 1 | View | test attachment | Project_Setup_Form.pdf |

[Add](#)

Form Action Items

| Acknowledgement | |
|-----------------|---|
| 1 | <input type="checkbox"/> Yes <input type="checkbox"/> No <p>I have reviewed comments and initial scope and budget information provided by Facilities Management and confirm my acceptance of these terms.</p> |
| 2 | <input type="checkbox"/> Yes <input type="checkbox"/> No <p>I understand that the Facilities Management Project Manager/Coordination will communication with the Project Contact listed on this form regarding changes to the Scope and Budget.</p> |



5.The Client can see the comments from the FM Estimator below the Comment section. They should click on the “**Accept Scope and Budget**” button to finalize budget and proceed to last stages of project approval (DOSA, Policy 2.15 Approver).

Comments

** Greg Ackland
** Fri, Feb 28 25, 02:35:13 PM
sample file attached for test of approval

** Tania Banerjee
** Fri, Feb 28 25, 10:17:17 AM
testing 12 (for screenshots after Accept Scope and Budget)

[View Approval Route](#)

[Return to Search](#)

[Cancel Request](#)

[Modify Project Request](#)

[Accept Scope and Budget](#)



Client users may also decline the scope and budget by modifying the project request or canceling the project request. Modifying the project request will require resubmission of the form, and the process will start over, going through all the prior approval stages.